

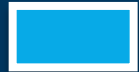








**INNOVATIVE**  
RESEARCH GROUP

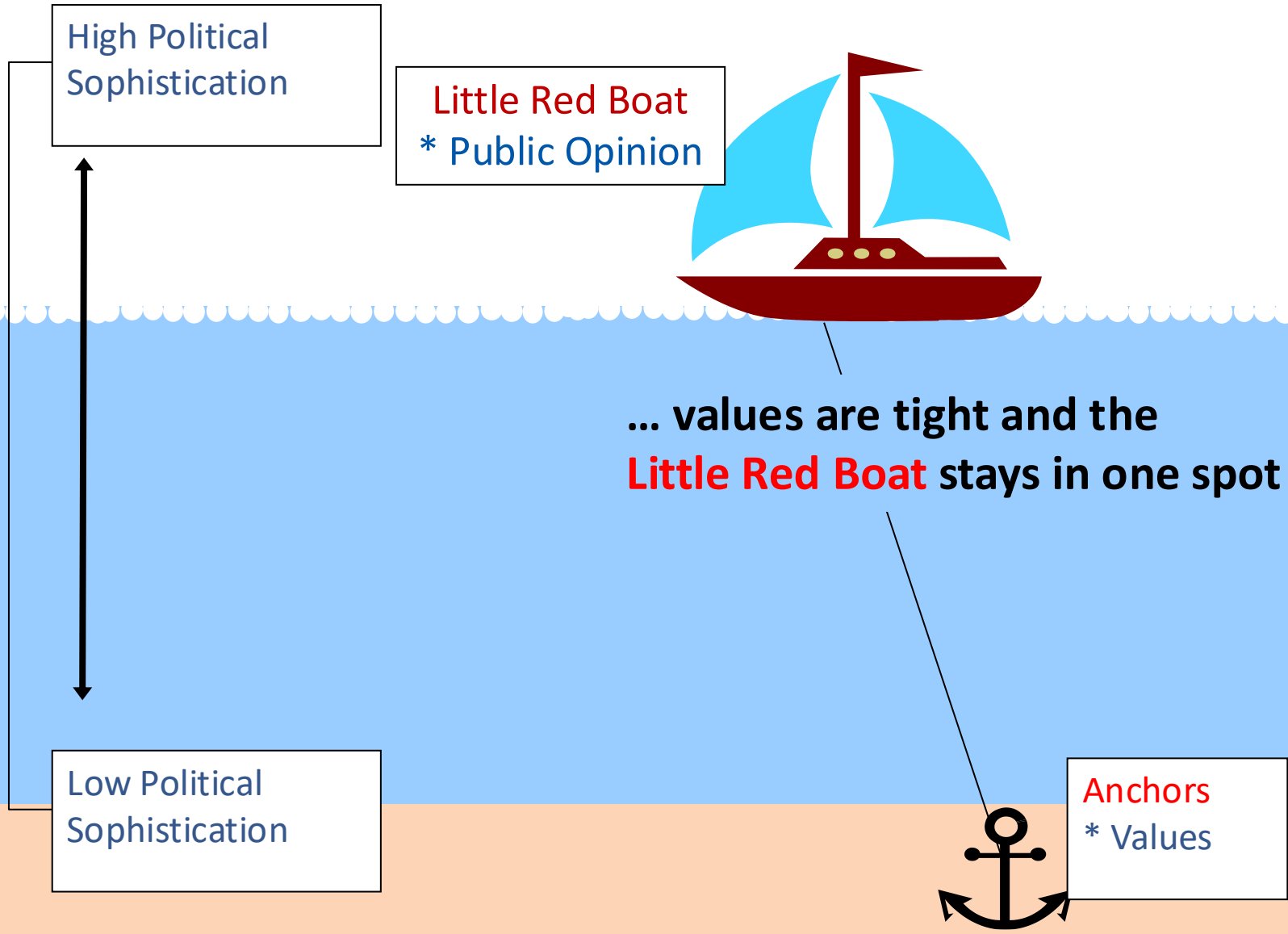
**Presentation**

# **Building for the future**

# Agenda

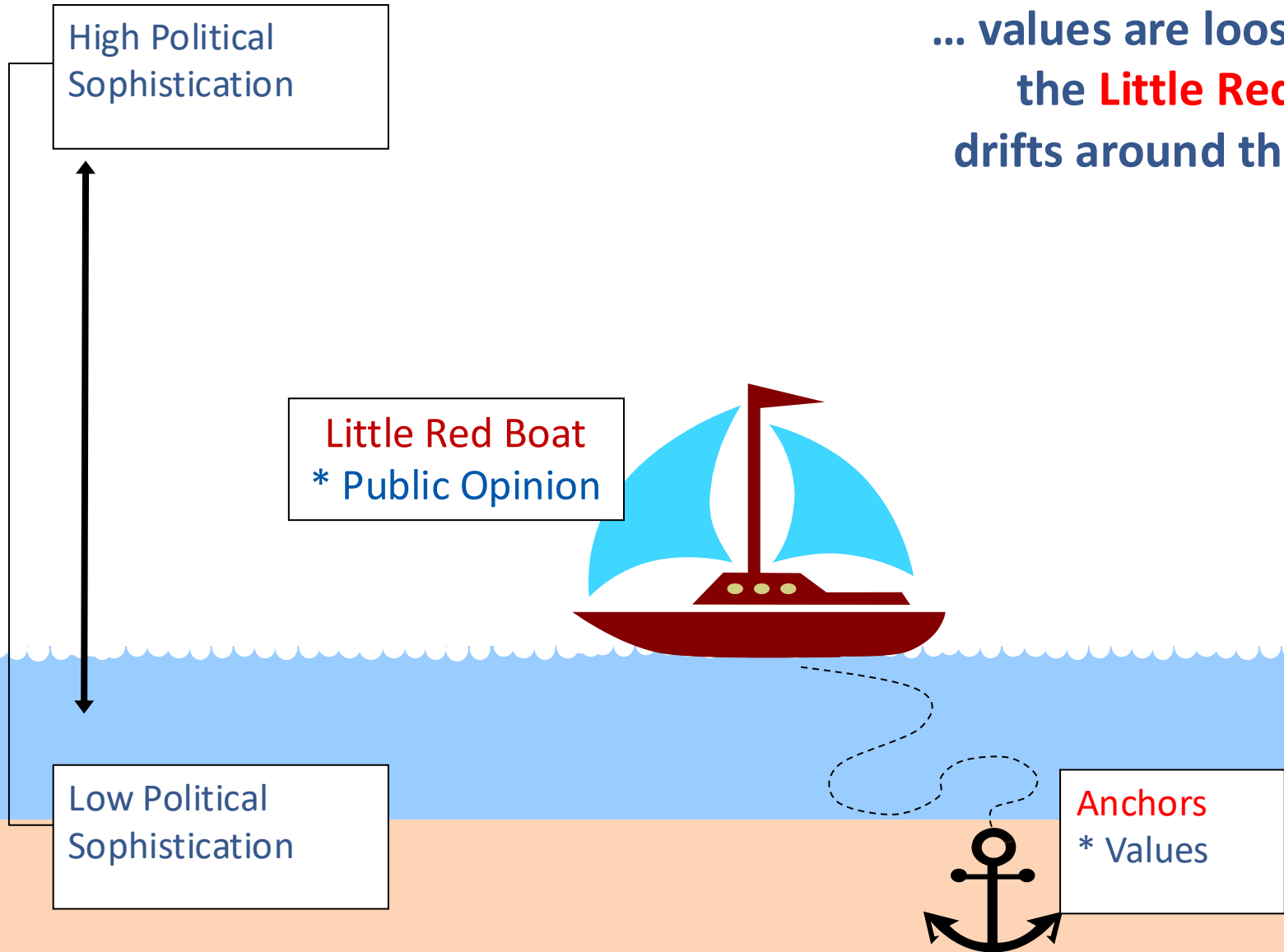
-  **Opinion Basics**
-  **Where We Left Off**
-  **Elite Alienation**
-  **Trump**
-  **Projects**
-  **Trust**
-  **Willingness to Pay**

But when the water is high...



When the water is low...

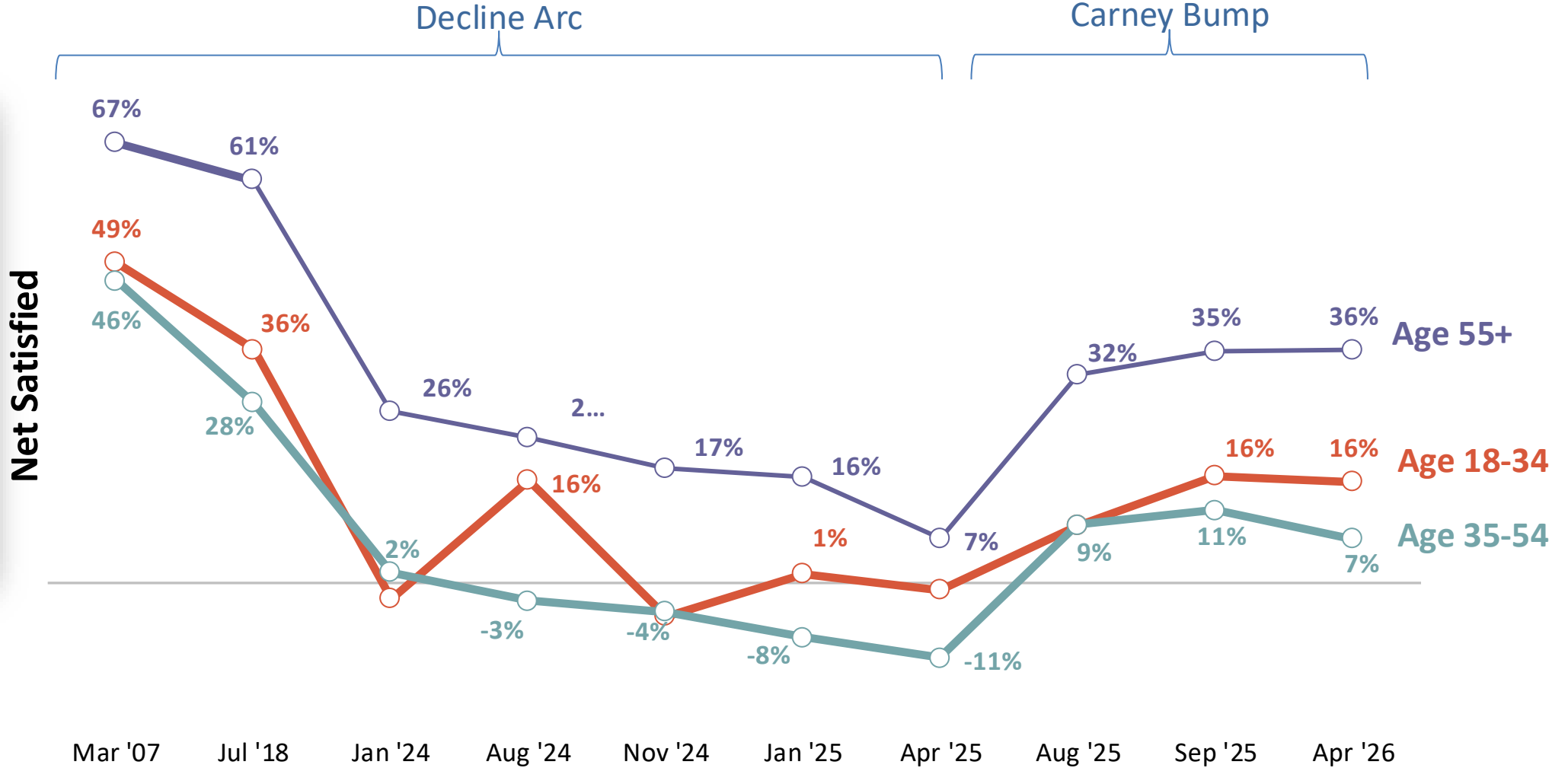
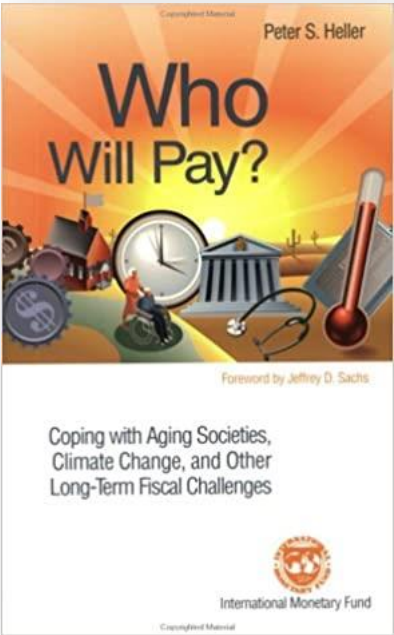
... values are loose and  
the **Little Red Boat**  
drifts around the lake



# Where We Left Off

# While satisfaction with Standard of Living has rebounded, economic realities mean it isn't going away soon

Q How satisfied are you with your current standard of living?  
[asked of all respondents nationally; n=1,500]



Note: Current data: April W1-2 2026

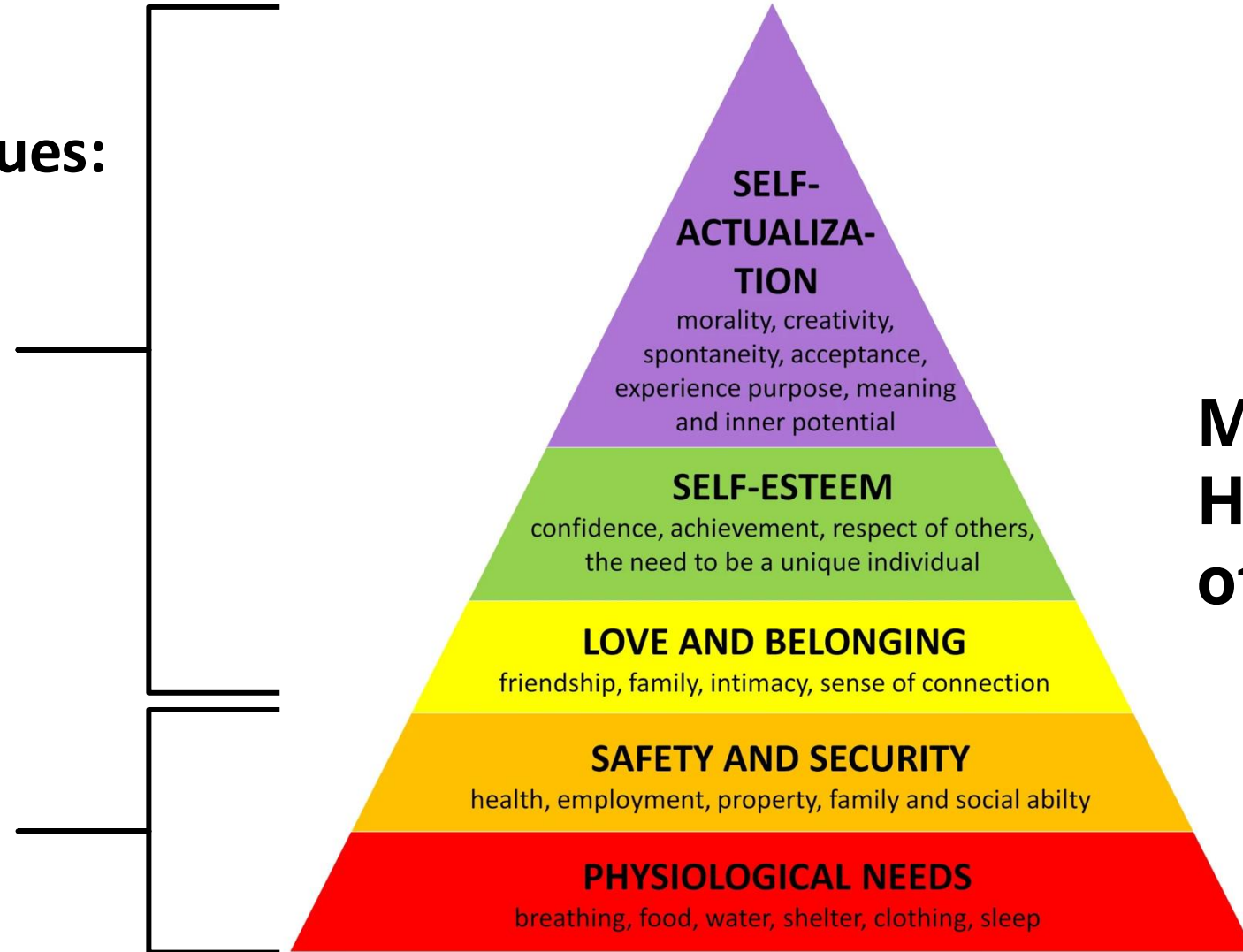
***Politics of scarcity*** is focusing us more on materialist concerns

### Post Materialism Issues:

- DEI
- Reconciliation
- Environment

### Materialist Issues:

- Affordability
- Housing
- Safety



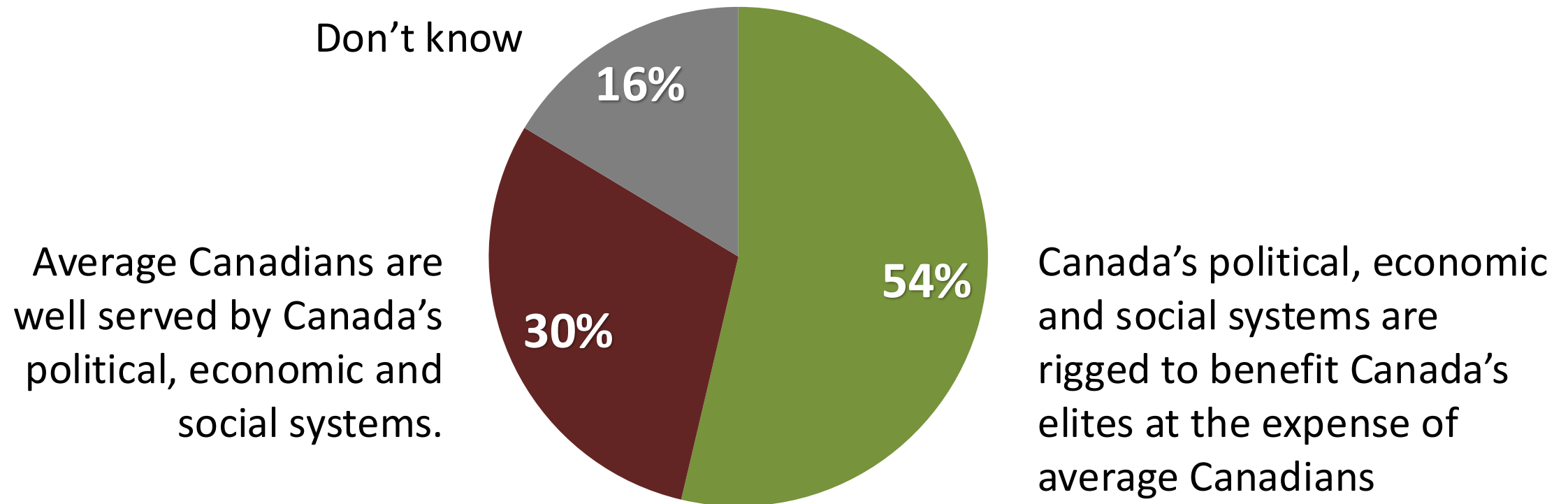
## Maslow's Hierarchy of Needs

# **An Important Addition: Elite Alienation**

# Lack of Progress on Prosperity is Leaving People Angry

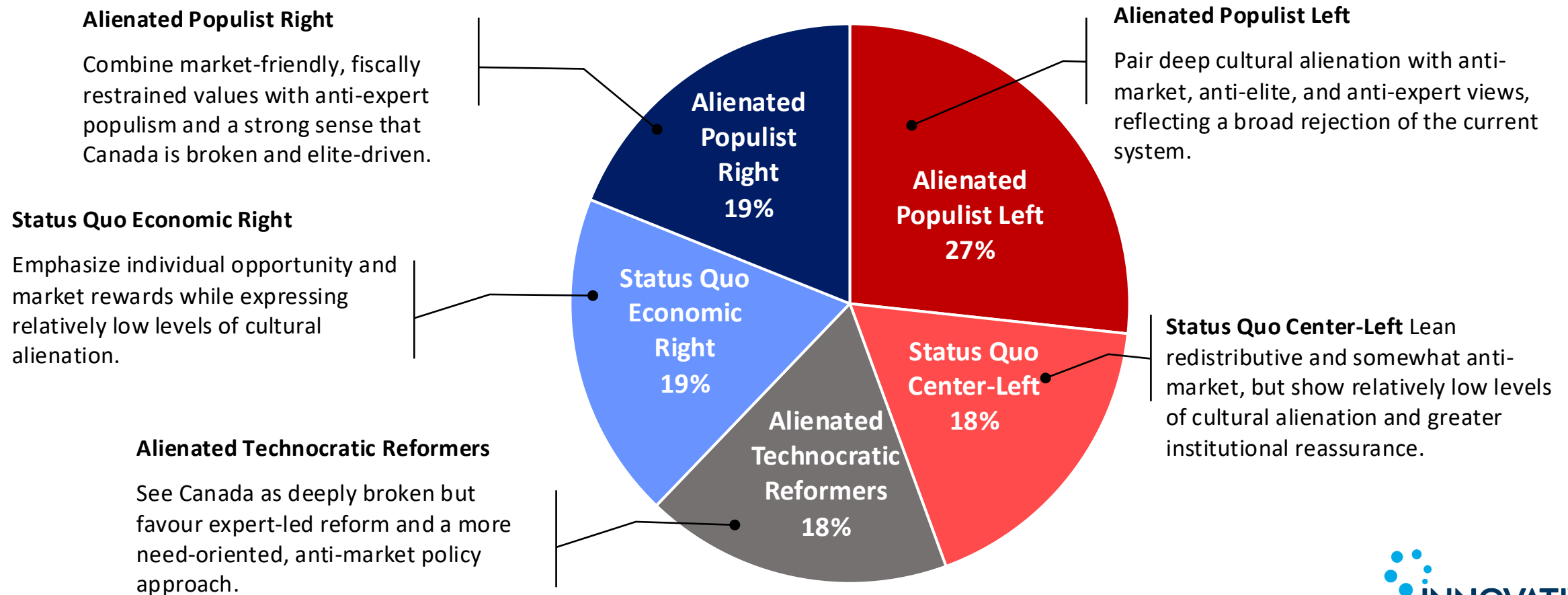
Q Which of the following statements comes closest to your view ...

[National; n=1,500]



# Culture Wars Clusters: Canadians differ in their views toward the establishment and national identity

Respondents' opinions on how things fare in six areas (Canadian identity, history, the system, institutions, elites, and future generations) were used to group them into five clusters.



# Federal Vote *by* Culture Wars: Populist Right is a cons. stronghold, Center Left is liberal, NDP draws evenly across left clusters

Culture War Clusters

		Alienated Populist Left (n=401)	Status Quo Center-Left (n=265)	Alienated Technocratic Reformers (n=266)	Status Quo Economic Right (n=283)	Alienated Populist Right (n=284)
Combined Federal Vote	Conservative	46%	12%	28%	30%	70%
	Liberal	24%	66%	41%	56%	15%
	NDP	14%	12%	18%	4%	4%
	Bloc	9%	6%	6%	6%	7%
	Green	5%	2%	6%	2%	3%
	Other	2%	2%	1%	1%	2%

# Separation

# Vote for Independence: 52% of ABs vs 42% of QCs would definitely vote to stay in Canada; nearly all NDP in AB say the same

**Q** If there was a referendum in your province, would you vote for [PROVINCE] to leave Canada and become its own country or to remain a province within Canada? [asked of all respondents, QC n=700; AB n=400]

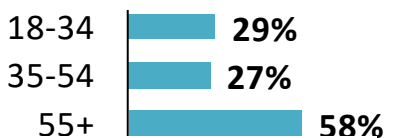
### AB Segmentation

'Net Stay in Canada'

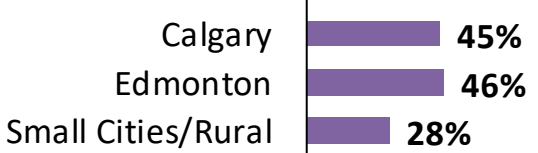
#### Gender



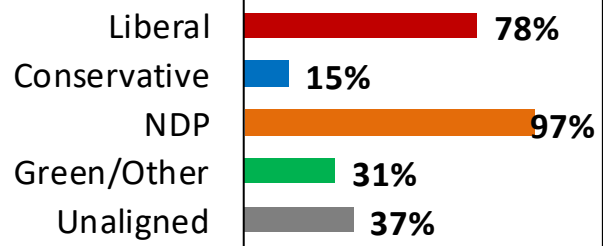
#### Age



#### Region



#### Federal Party ID



#### Economic Gap



### QC Segmentation

'Net Stay in Canada'

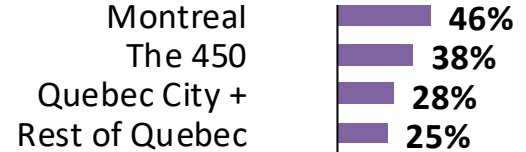
#### Gender



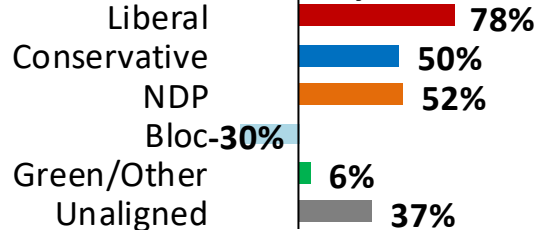
#### Age



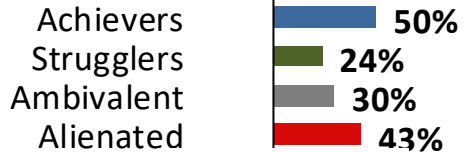
#### Region



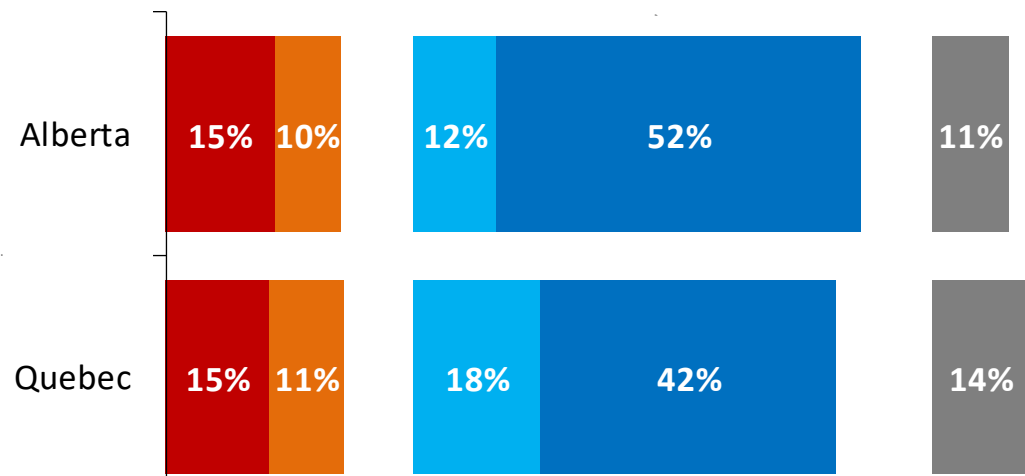
#### Federal Party ID



#### Economic Gap



#### Language



- Definitely would vote for my province to become an independent country
- Probably would vote for my province to become an independent country
- Probably would vote for my province to stay in Canada
- Definitely would vote for my province to stay in Canada
- Don't know

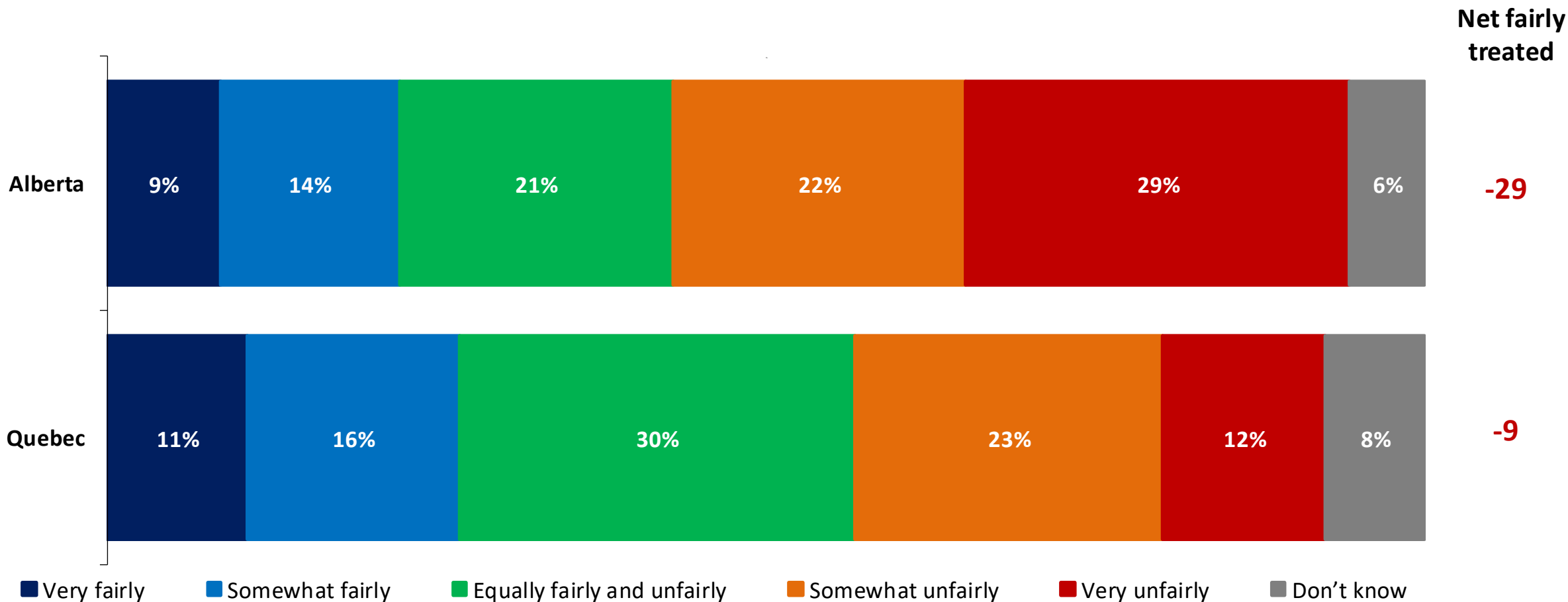
**Preamble to the question:** There has been growing attention lately in some provinces to the idea of some provinces leaving Canada to become their own countries.

**Current data:** April 2026

# Unfairly Treated: Albertans with more grievances toward the feds, 51% feel AB was treated unfairly vs 36% of Quebecers<sup>14</sup>



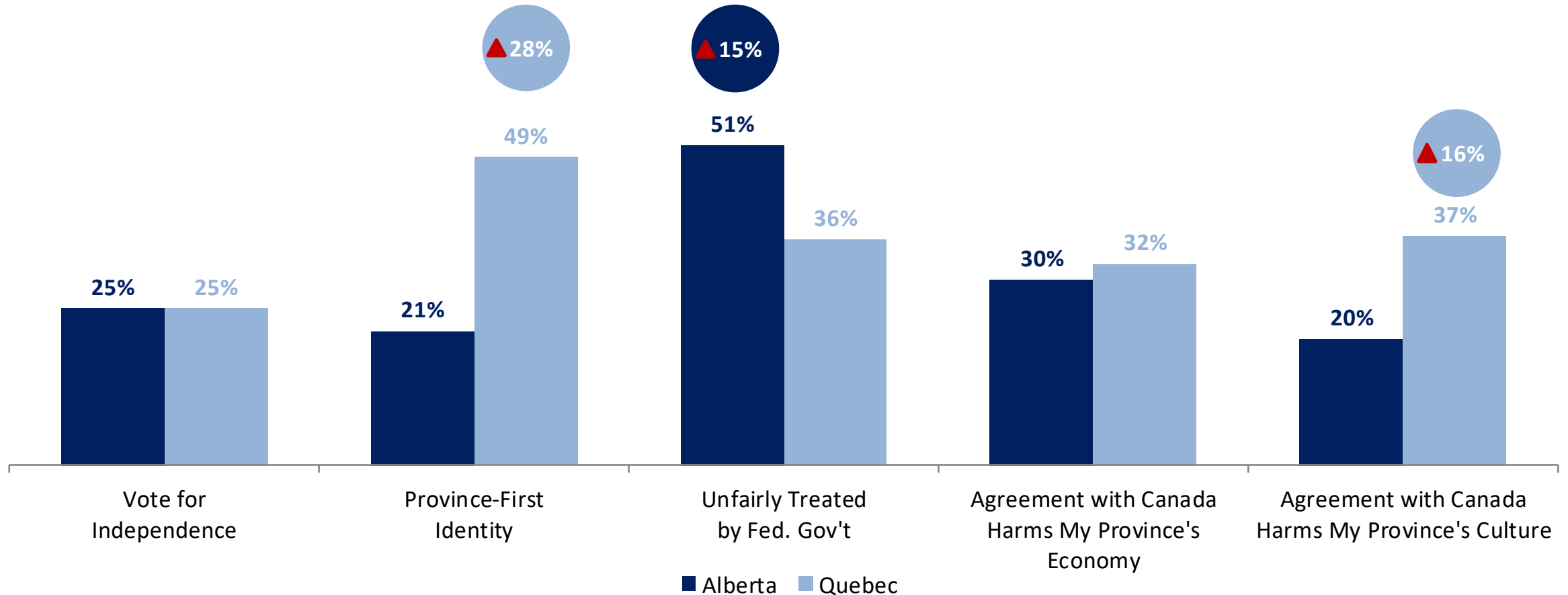
Thinking about Alberta/Quebec's relationship with the federal government over the years, do you feel Alberta/Quebec has generally been treated ...  
[asked of all respondents, QC n=300; Alberta n=400]



Current data: For QC - March [W1-W2] 2026, For AB - April 2026

# Alienation & Separatism Indicators - Alberta vs. Quebec: Similar levels of independence support (25% each), but diverge on the drivers

% of respondents expressing alienation/separatist sentiment on each measure



## Sources:

**Vote for Independence** - [Definitely and probably] If there was a referendum in your province, would you vote (ROTATE) for [PROVINCE] to leave Canada and become its own country or for [PROVINCE] to remain a province within Canada?

**Province First** - [Usually and always Province First combined] - When we think about our connection to our province and our country, sometimes we find ourselves with competing loyalties. When that happens, do you consider yourself as a/an [PIPE-IN] before Canadian or a Canadian before [PIPE-IN]?

**Federal treatment** - [Somewhat and very unfairly combined] - Thinking about [INSERT PROV]'s relationship with the federal government over the years, do you feel [INSERT PROV] has generally been treated

**Economic harm** - [Somewhat and strongly agree] - Being a part of a unified Canada is harmful to my province's economy

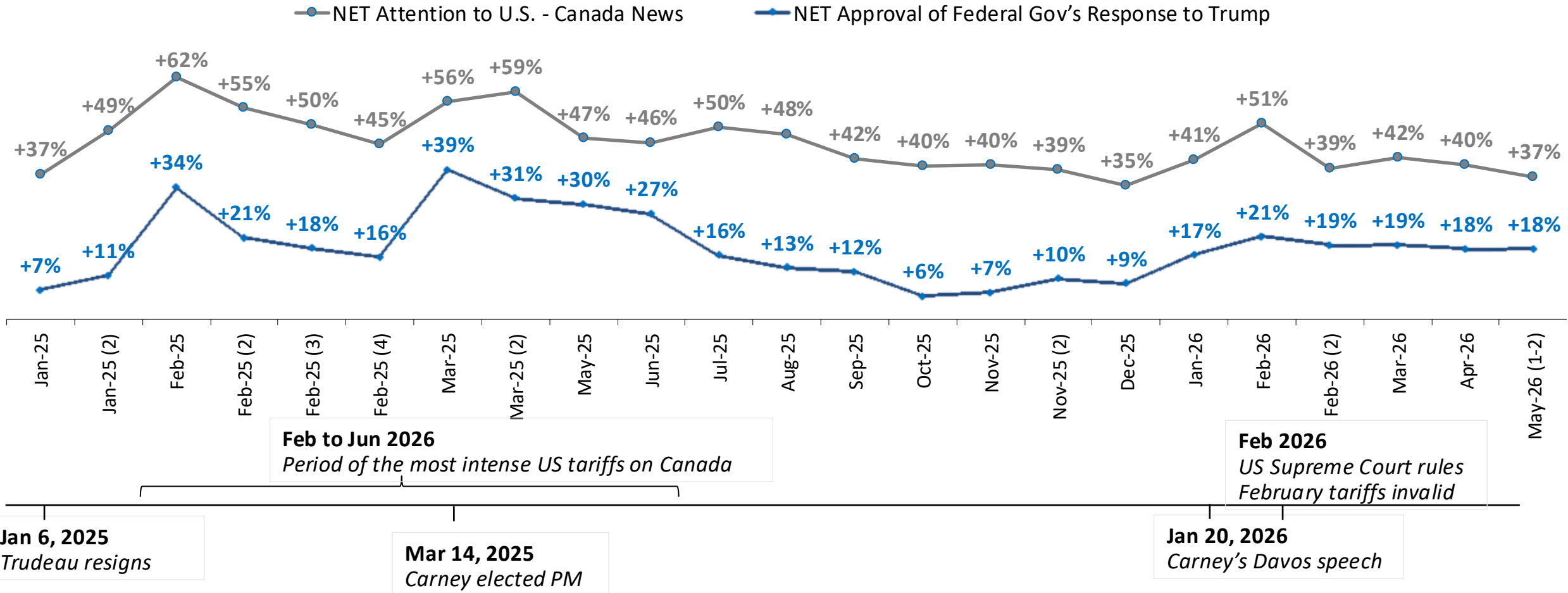
**Cultural harm** - [Somewhat and strongly agree] - Being a part of a unified Canada is harmful to my province's distinct culture

# Trump and Tariffs

# NET Approval of Federal Gov's Response to Trump: Net attention to U.S.<sup>17</sup> Can news in decline since Mar. while Net approval marginally unchanged



How closely are you following the news about the relationship between Canada and the US now Donald J. Trump is the President of the United States once again?  
 Now thinking about the federal government, do you approve or disapprove of the way the Federal government is responding to issues resulting from Donald Trump's presidency? [asked of all respondents; n=1,500]

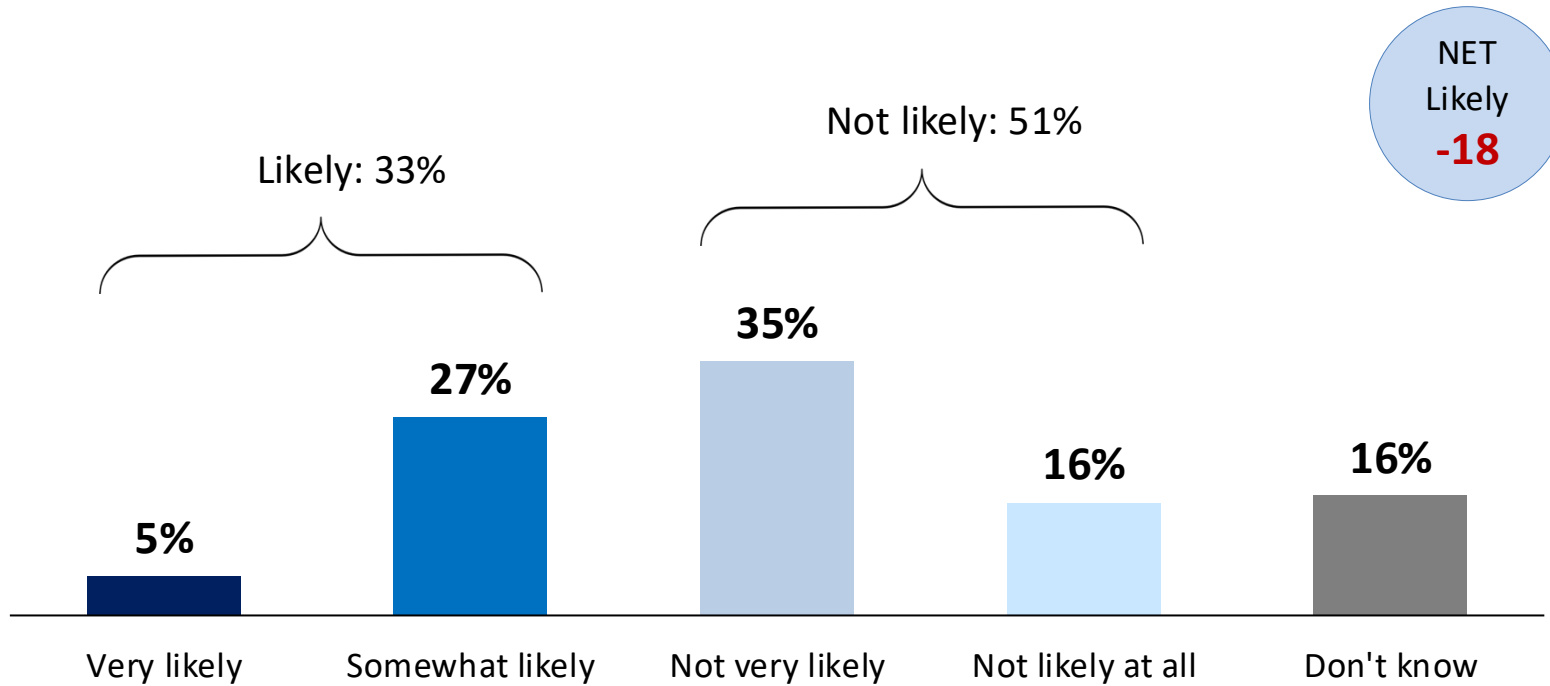


**Note:** No, Don't know not shown.  
 Current data: May 2026 (W1-2)

# Likelihood of Reaching Agreement: More than half believe it's not likely<sup>18</sup> that Canada will reach a trade agreement; lower among Liberals



How likely do you think it is that Canada will reach a new trade agreement with the United States during Donald Trump presidency?  
[asked of all respondents; n=1,500]



## Segmentation

Those who say 'Not likely'

### Gender



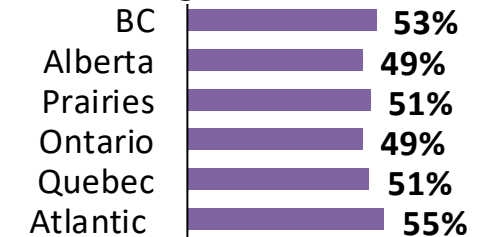
### Age



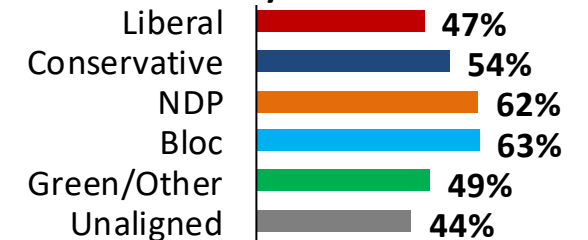
### Economic Gap



### Region



### Party ID

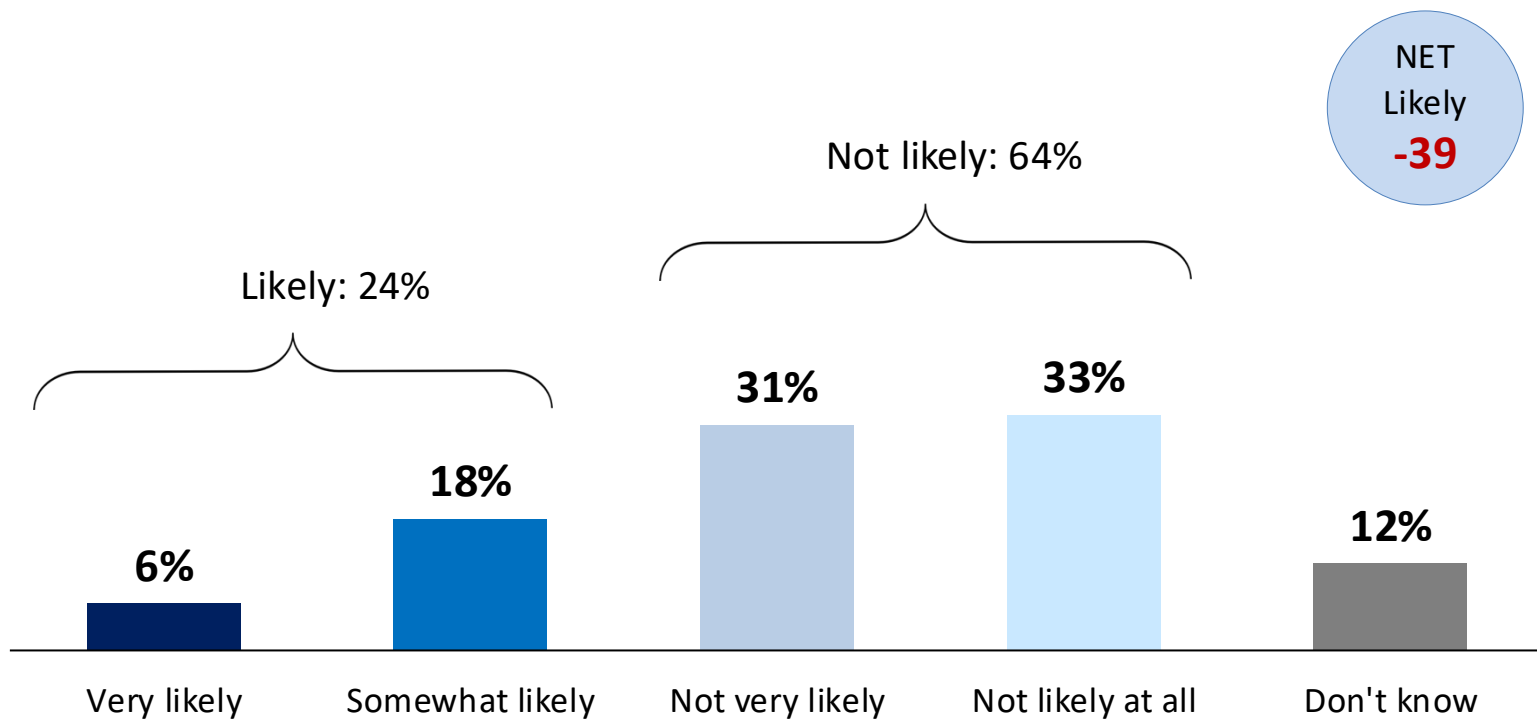


# Likelihood of Trump Following Through: Nearly 2-in-3 believe Trump would not stick to a new trade agreement; higher among 55+



If a trade agreement were reached between Canada and United states, how likely do you think it is that Donald Trump would stick to that agreement?

[asked of all respondents; n=1,500]



## Segmentation

Those who say 'Not likely'

### Gender



### Age



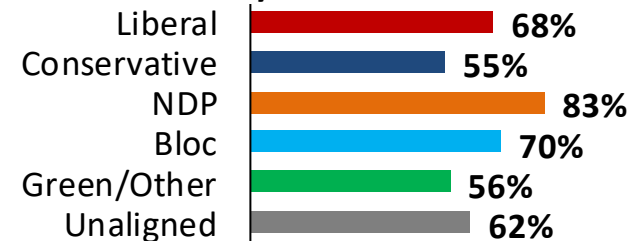
### Economic Gap



### Region



### Party ID

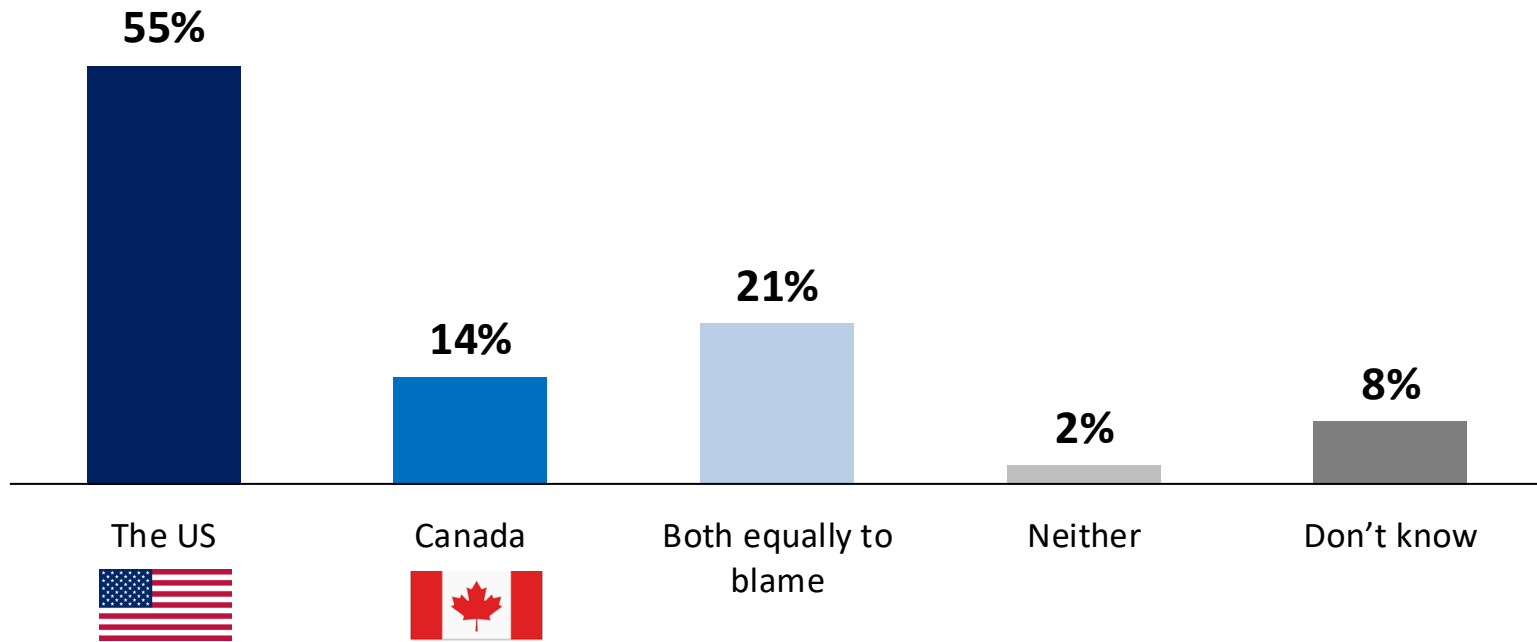


# Placing The Blame: 55% say the US is most to blame; those 55+, NDP, and Liberals more likely to agree



If we do not reach a new trade agreement with the United States during Donald Trump presidency, which government do you feel will be most to blame?

[asked of all respondents; n=1,500]



### Segmentation

Those who say 'the US'

#### Gender



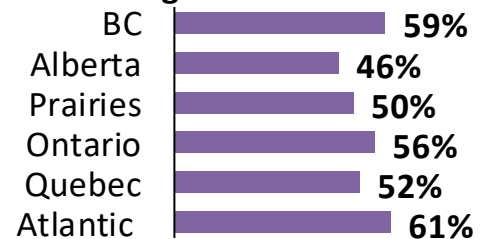
#### Age



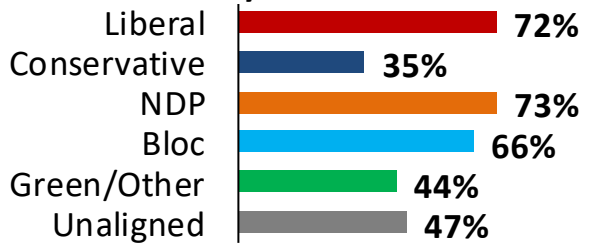
#### Economic Gap



#### Region



#### Party ID

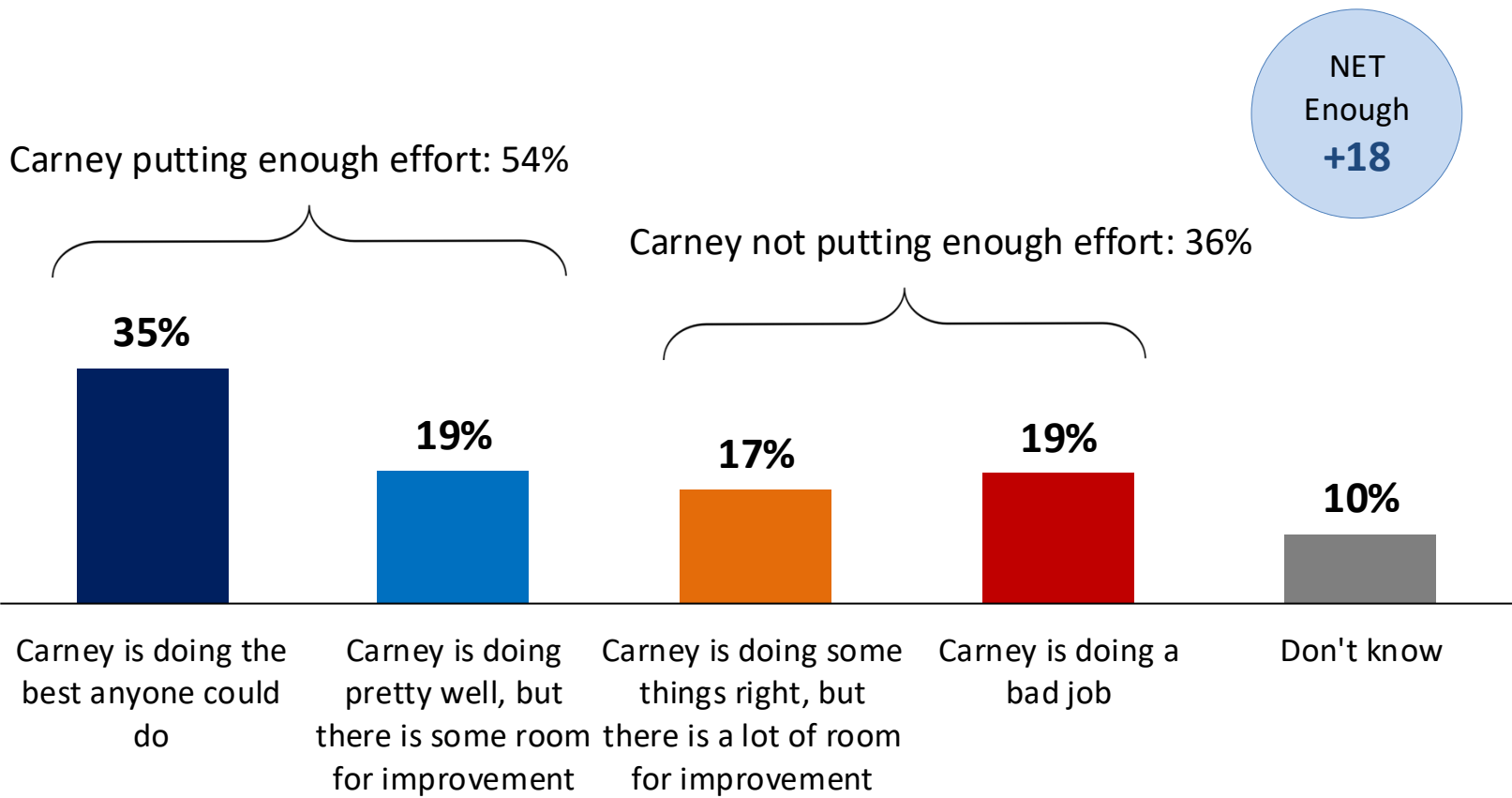


# Assessing Carney's Effort: Over half of respondents say Carney is putting enough effort; lower among Conservatives and Alberta region



Which statement best reflects what you think about the effort Prime Minister Carney has made to reach a new trade deal with the US?

[asked of all respondents; n=1,500]



### Segmentation

Those who say 'Enough effort'

#### Gender



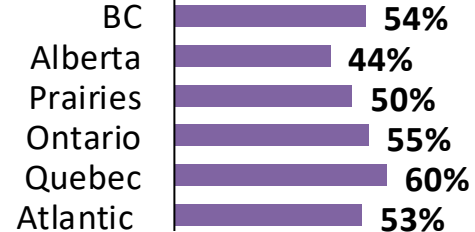
#### Age



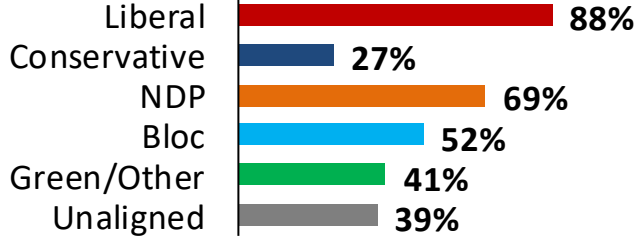
#### Economic Gap



#### Region



#### Party ID

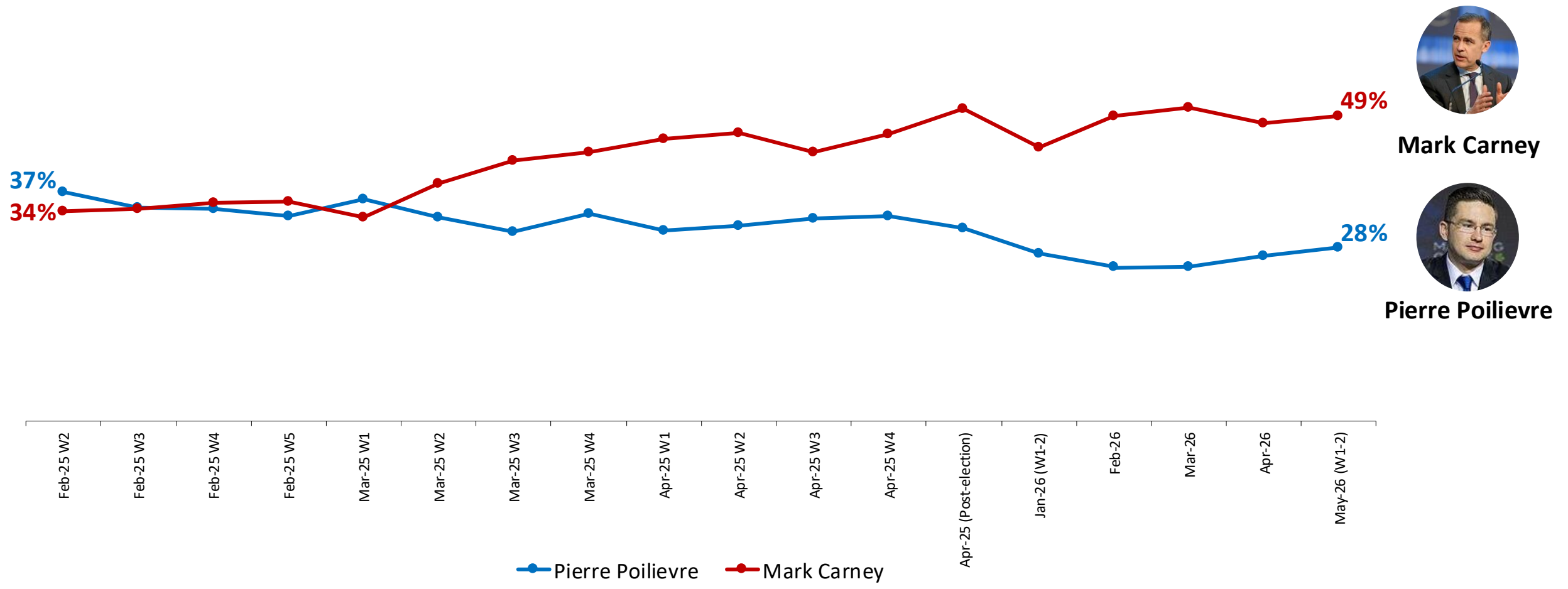


# Best Leader for Canada-US Relations Tracking: Carney leads Poilievre by 21 points on Canada-US relations



Which of the following leaders do you believe is best equipped to handle Canada-US relations during Trump's renewed presidency?

[asked of all respondents, Feb. '25 W2, W3, W4, W5 each n=1,200; Mar. '25 W1, W2, W3, W4 each n=1,200; Apr. '25 W1, W2 each n=1,200; Apr. '25 W3 n=1,200, W4=2,000, W(post election) n=2,000, Jan. '26 (W1-2) n=1,000, Feb. '26 n=2,000, Mar. '26 n=2,000, Apr. '26 n=3,000, May. '26 (W1-2) n=1,500]



Mark Carney



Pierre Poilievre

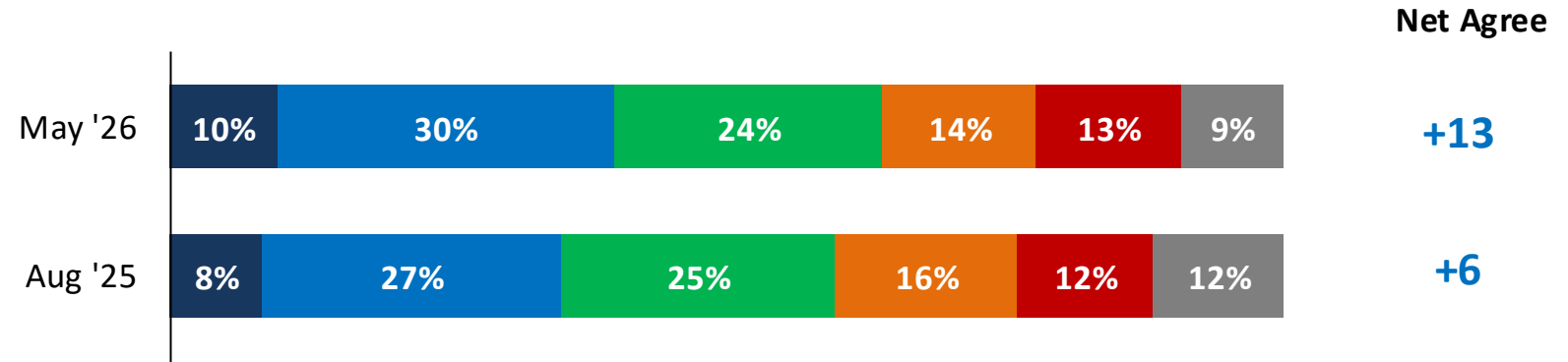
# Fed's Supporting Canadian Businesses & Workers: Net agreement that federal gov't is doing enough for businesses has increased by 7 points



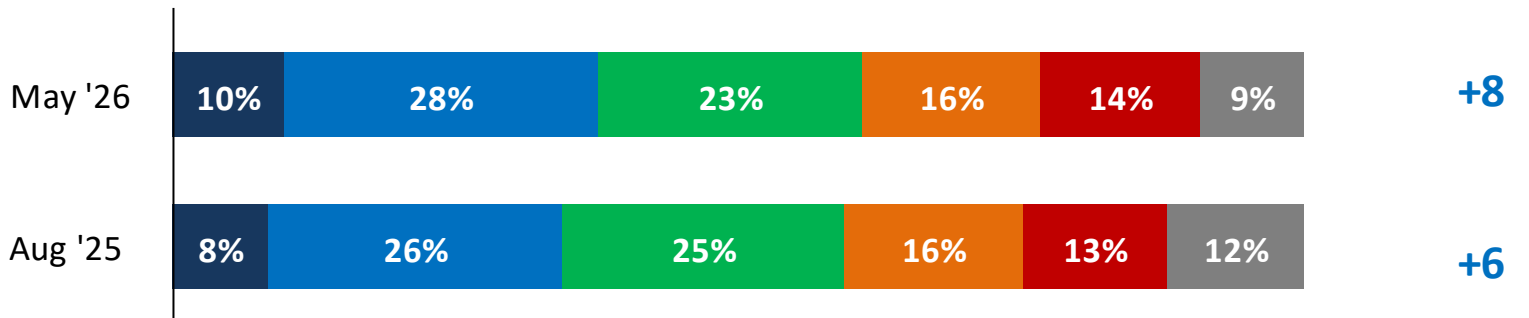
Do you agree or disagree with the following statements?

[asked of all respondents; n=1,500]

The Federal government is doing enough to support **Canadian businesses** during this trade dispute with the United States.

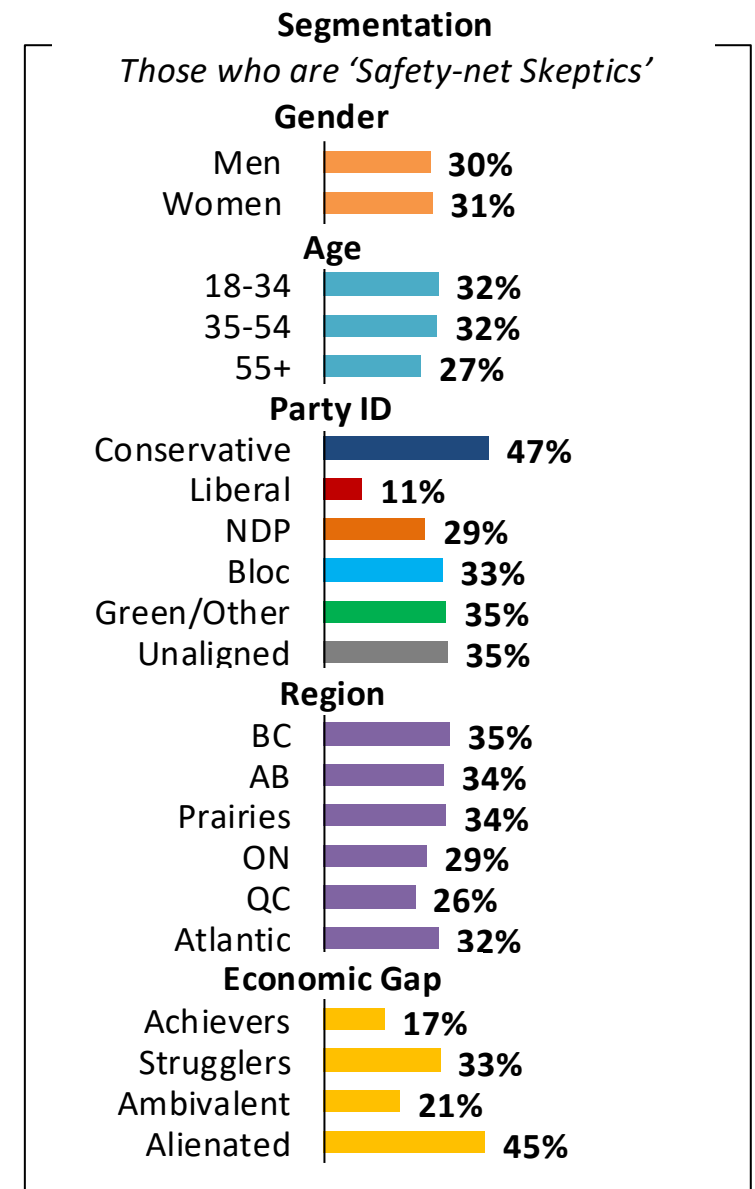
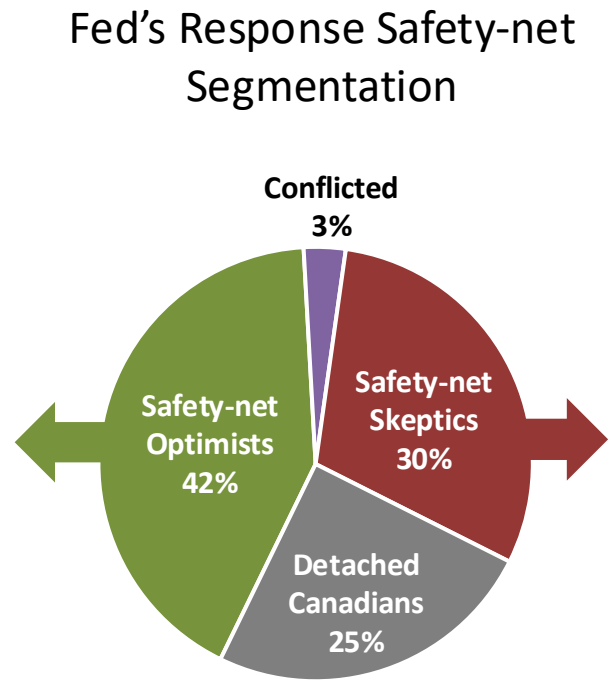
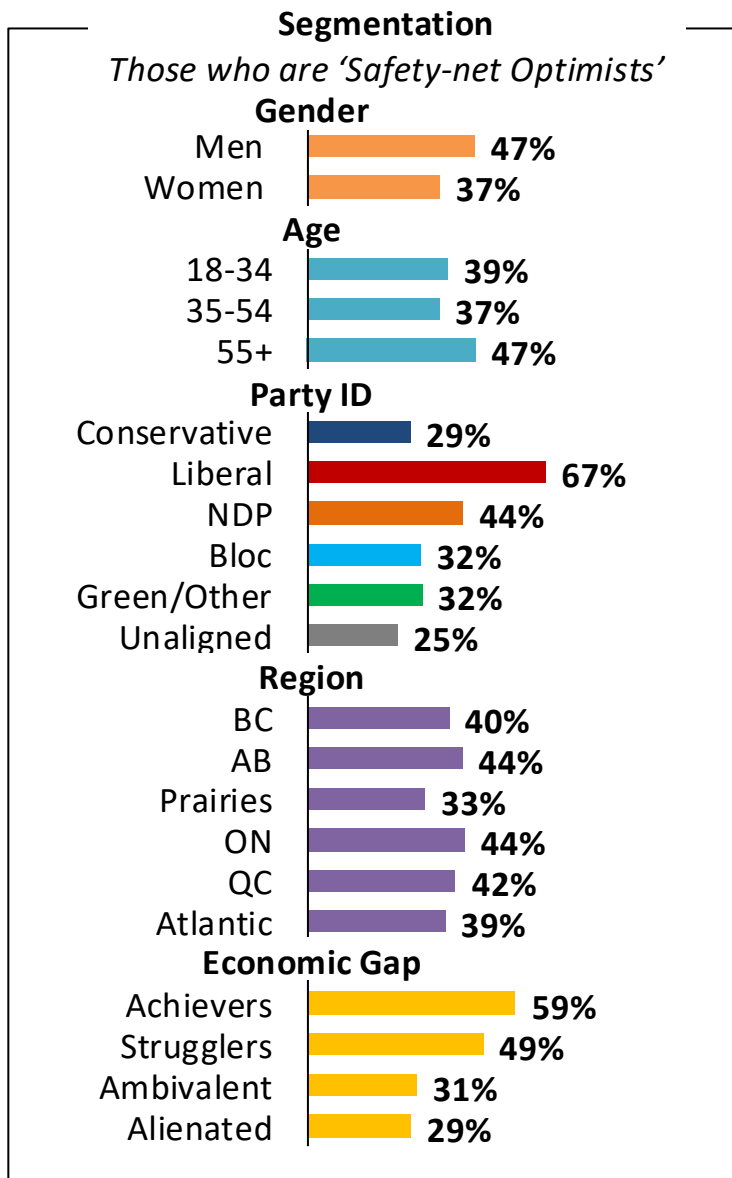


The Federal government is doing enough to support **Canadian workers** during this trade dispute with the United States.



■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

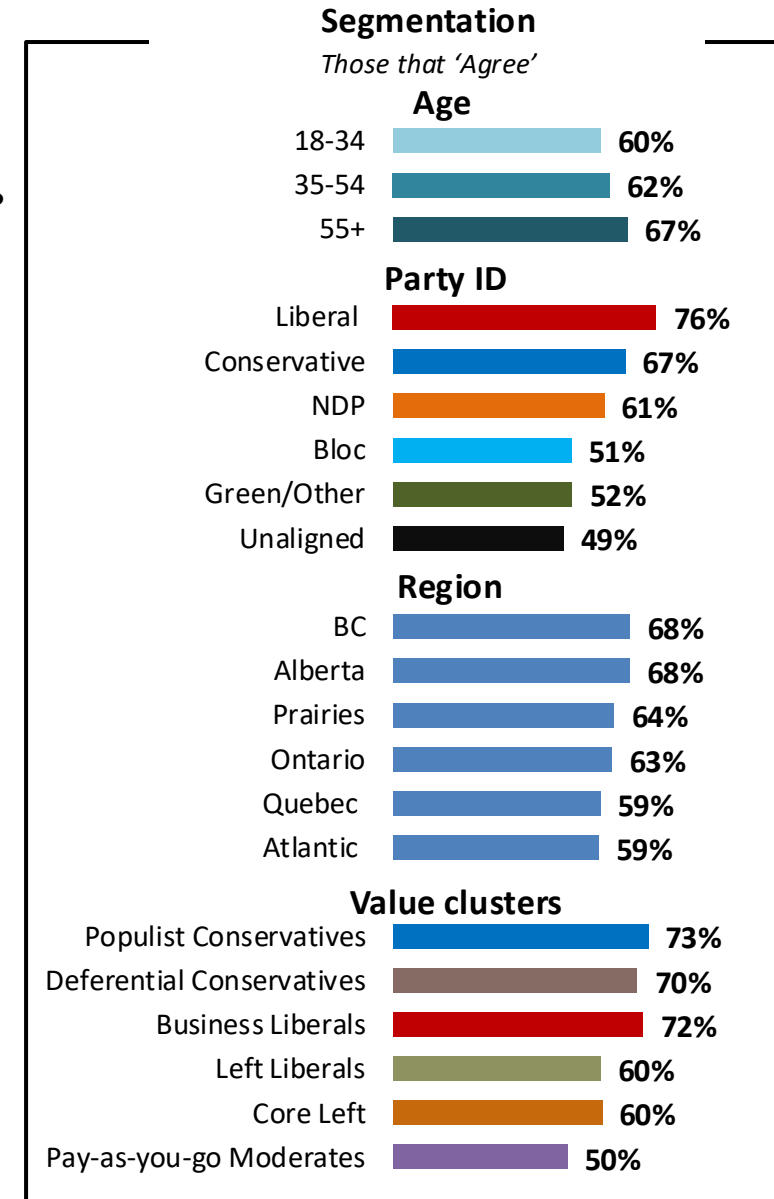
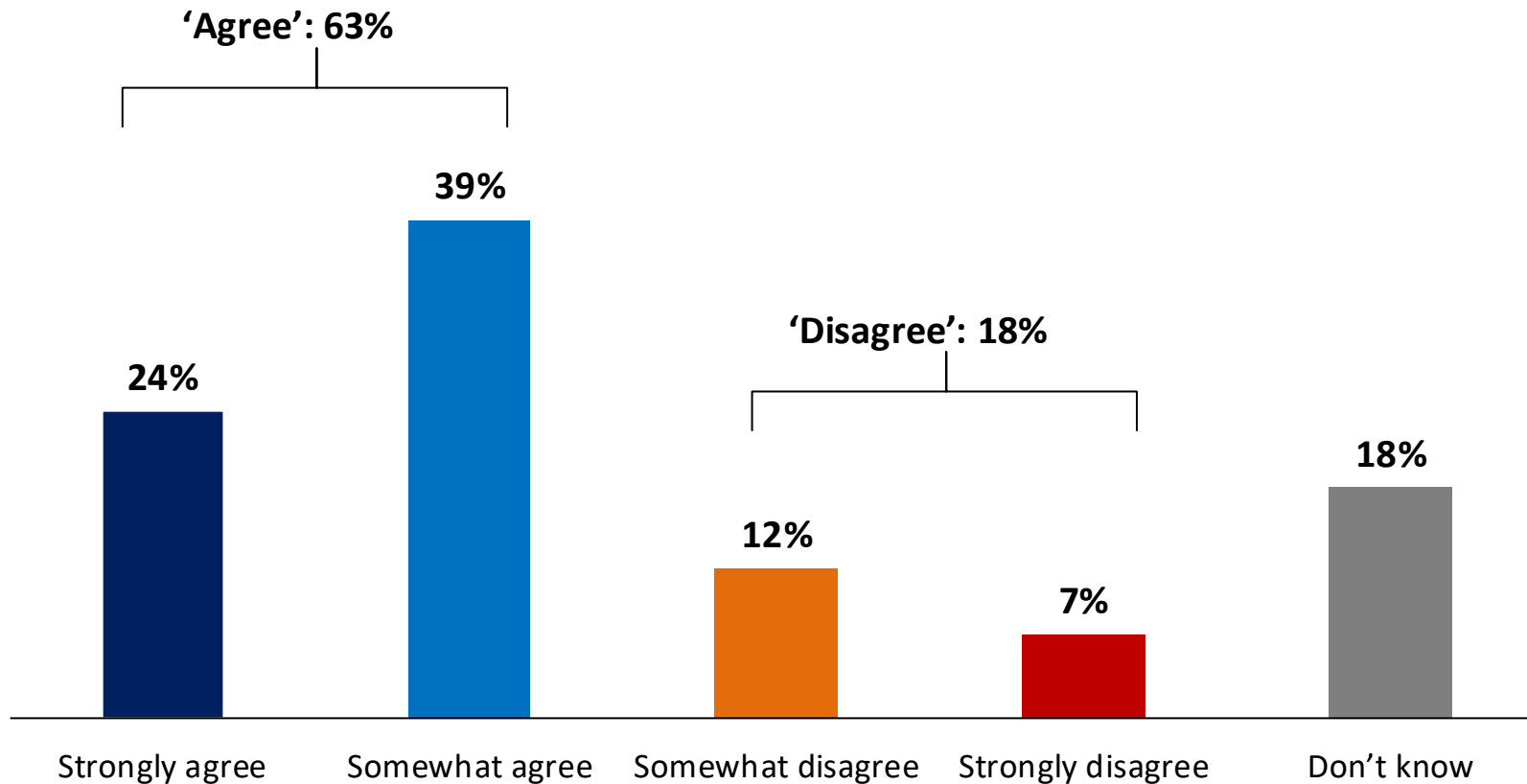
# Fed's Response Safety-net Segmentation: 42% are optimists, higher among men and Liberals; 30% are skeptics, higher among Conservatives



# MOU Build Stronger Canadian Economy: Agreement with this is highest<sup>25</sup> among Liberals (76%) and among conservative value clusters

Q Do you agree or disagree with the following statements about the proposed MOU?  
 [asked of all respondents, n=1,250, oversamples in AB, BC, QC]

*This agreement is a good way to build a stronger Canadian economy and reduce our dependence on the United States.*



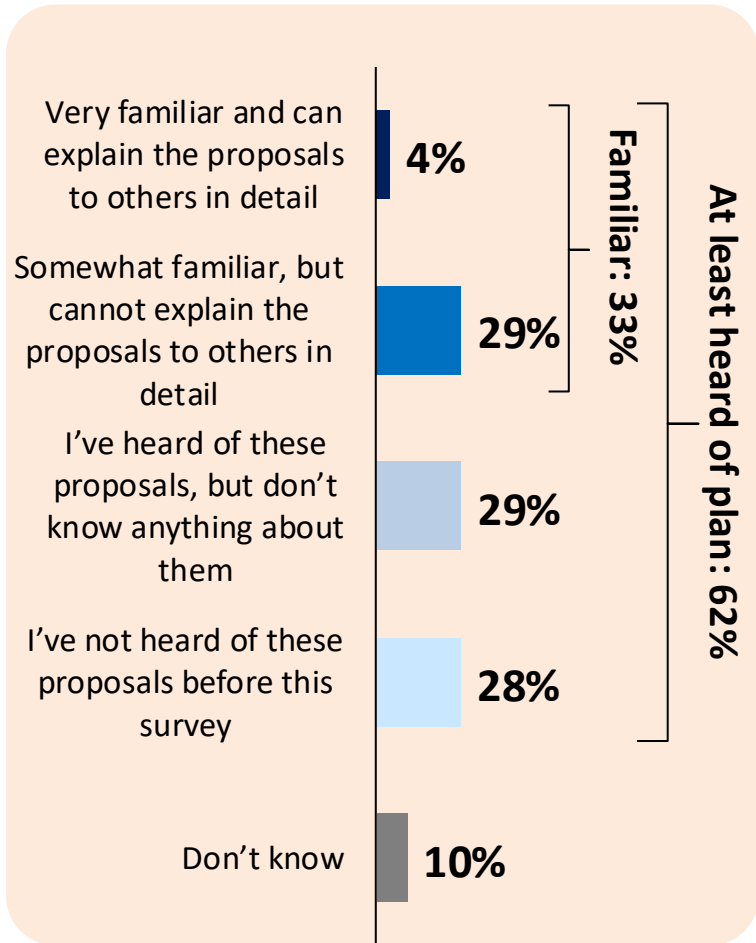
# Build Baby Build

# Impressions of Regulatory Proposals: Plurality (41%) think that reform is a good thing; only 8% with negative impressions

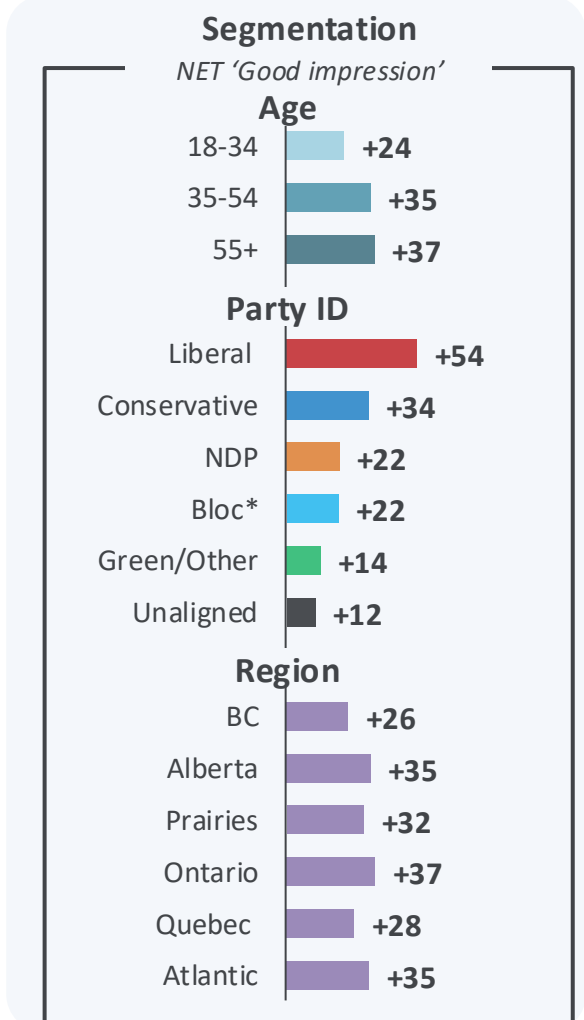
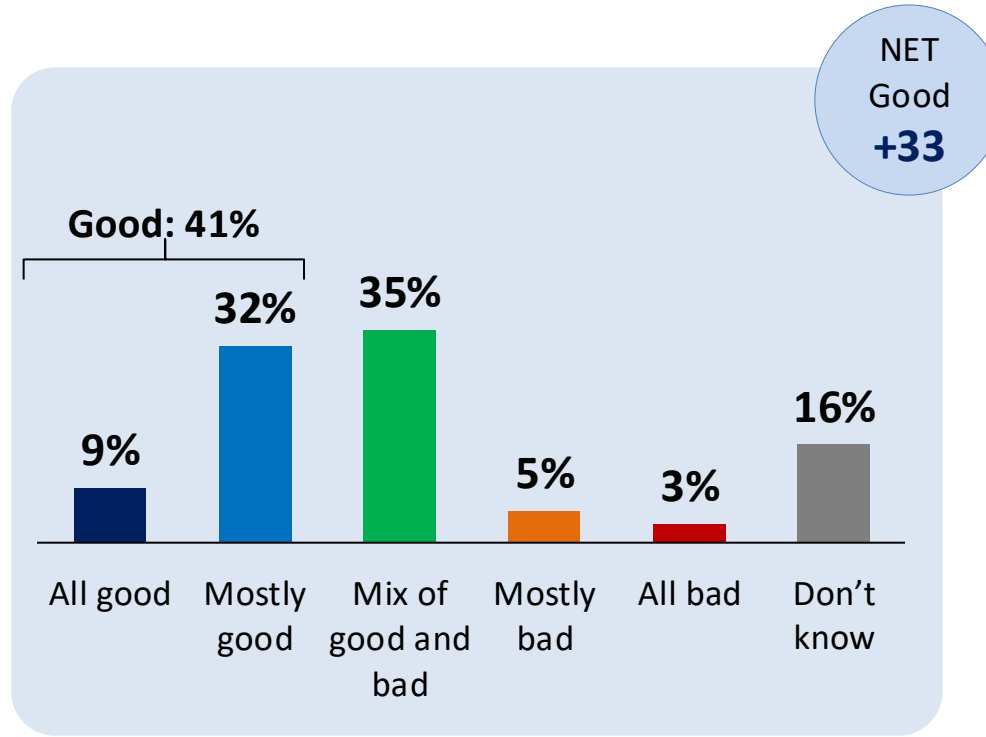
**Familiarity:** ... How familiar would you say you are with these proposals?

**Impressions:** Based on your first impression, or from what you know, do these proposals ... sound like a good thing or a bad thing?

[asked of all respondents nationally, n=1,000]



Earlier this month, Prime Minister Mark Carney's Liberal government announced a consultation on a series of proposals to create **a simpler, more coordinated process to make federal decisions for major projects in a shorter time frame**. These changes would respect existing indigenous constitutional and treaty rights.



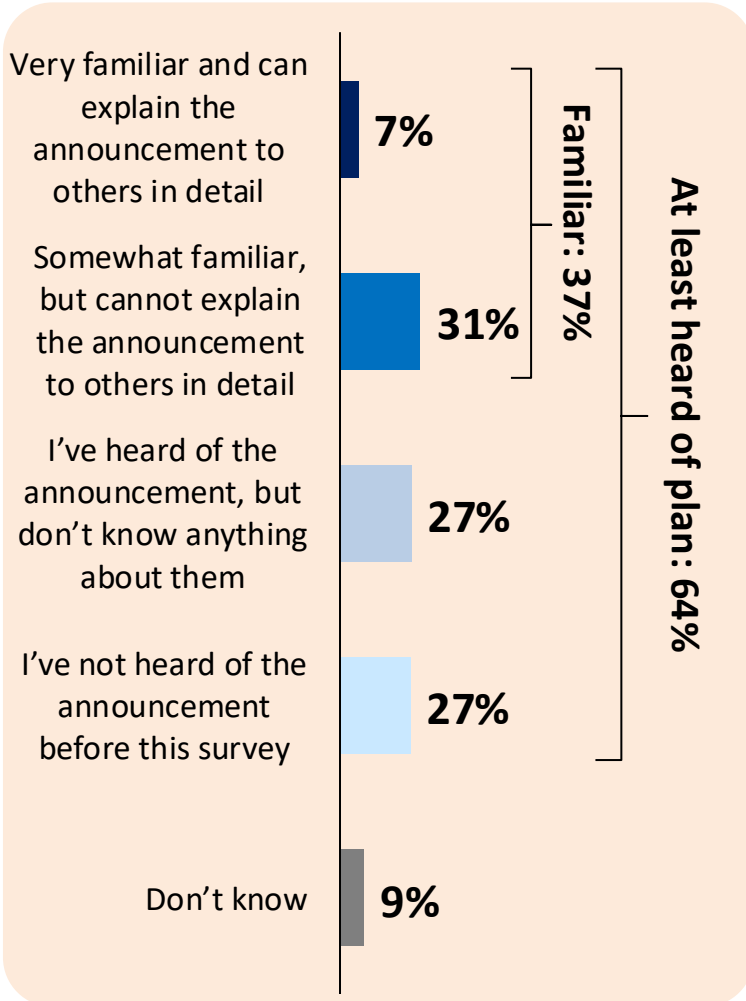
Current data: May 2026 (W3)

\*Sample size <50, results should be interpreted with caution

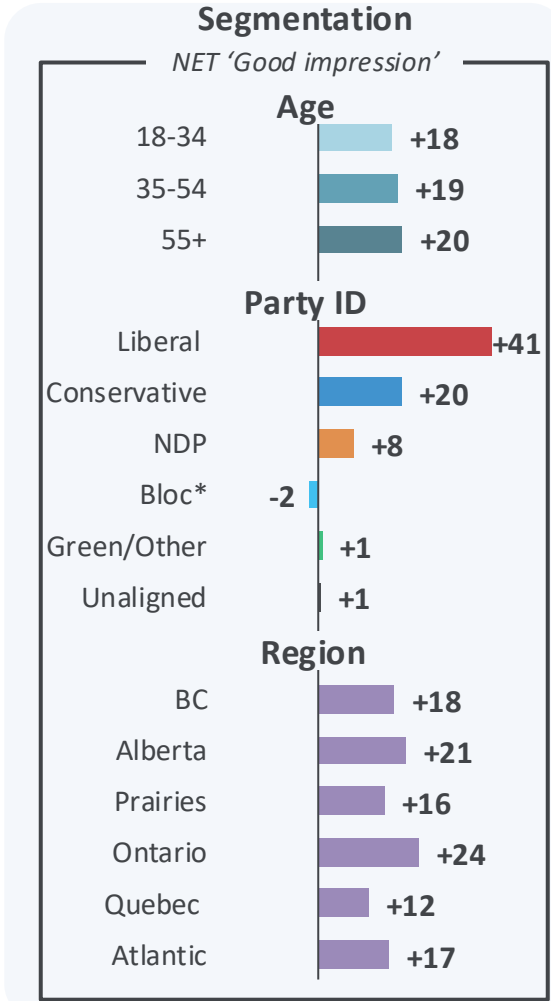
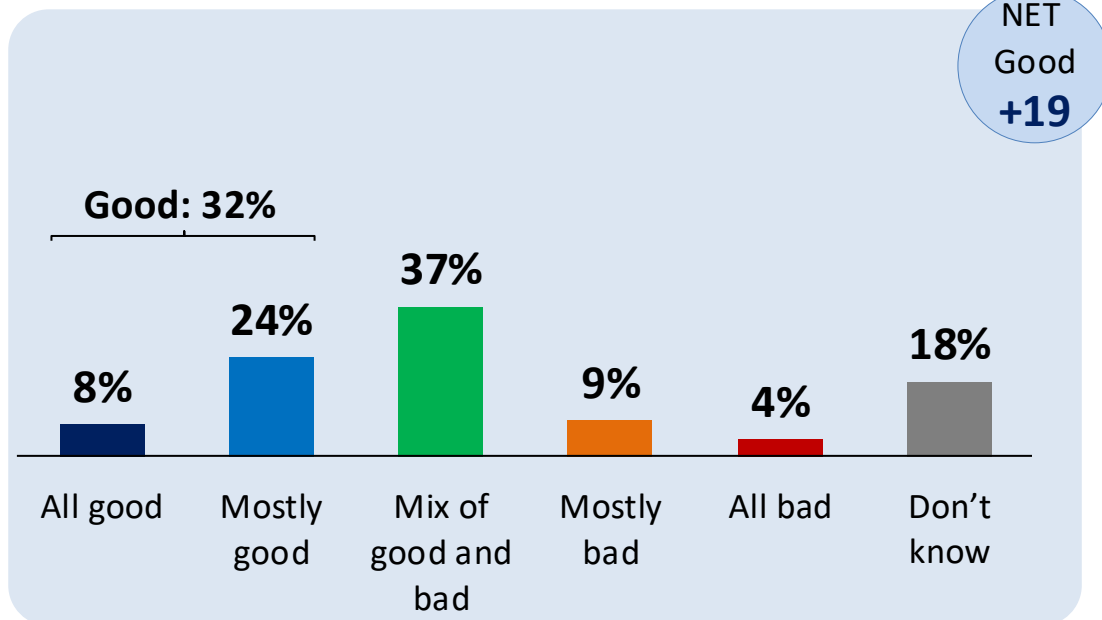
# Impression of Energy Announcement: Plurality (37%) think that energy announcement is a mix of good and bad; 32% see it as good

**Q Familiarity:** ...How familiar would you say you are with this announcement?

**Impression:** Based on your first impression, does the plan to increase the industrial carbon price ... while also advancing new pipeline development, sound like a good/bad thing? [asked of all respondents nationally, n=1,000]



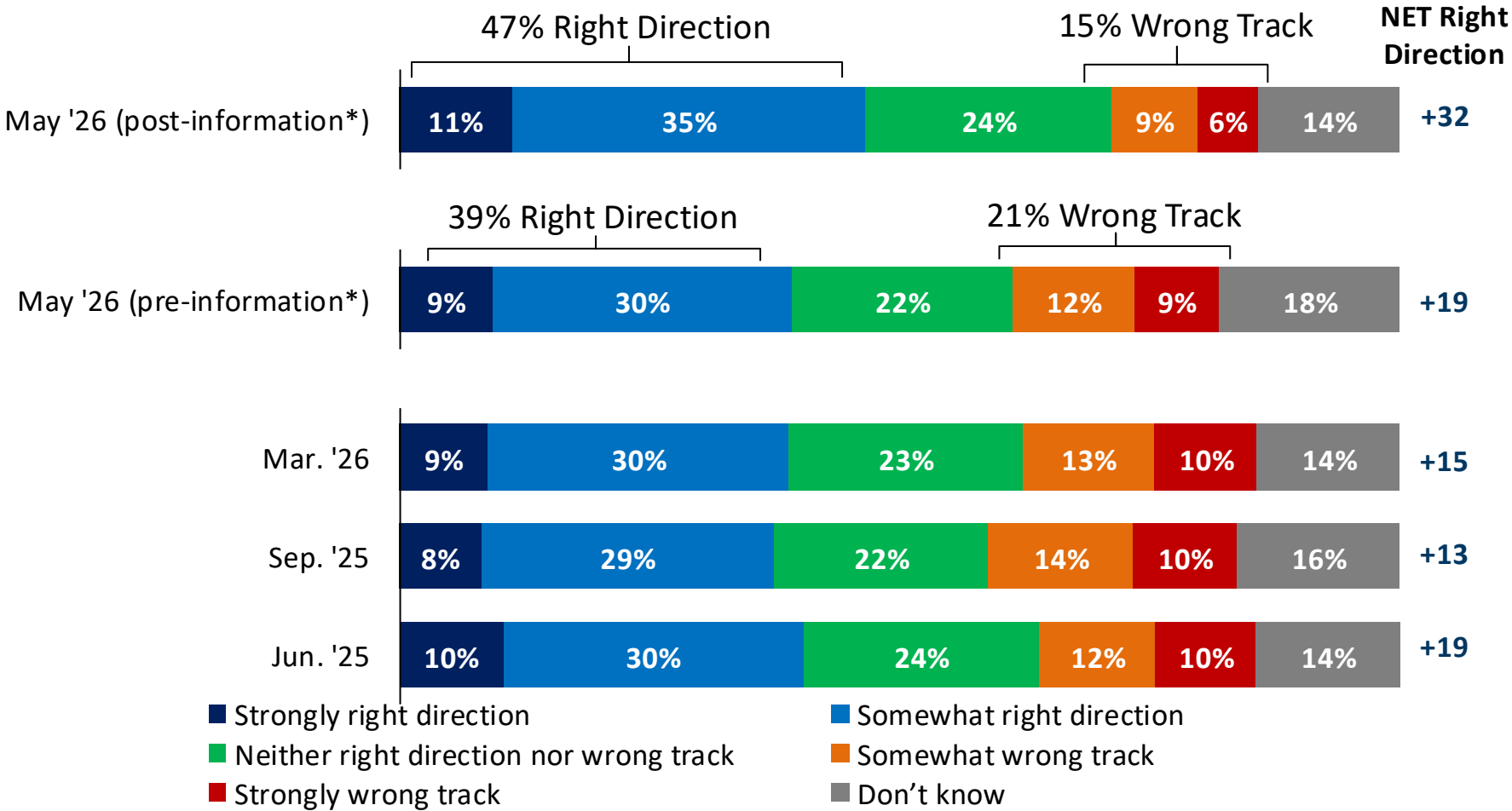
On Friday, May 15th 2025, Prime Minister Mark Carney and Alberta Premier Danielle Smith announced new steps to implement their Memorandum of Understanding to develop Alberta's energy sector and make Canada an energy superpower. The announcement included a plan to raise the **industrial carbon price** paid by large emitters to \$130 per tonne by 2040. It also included new steps to advance a proposed **pipeline to the West Coast**.



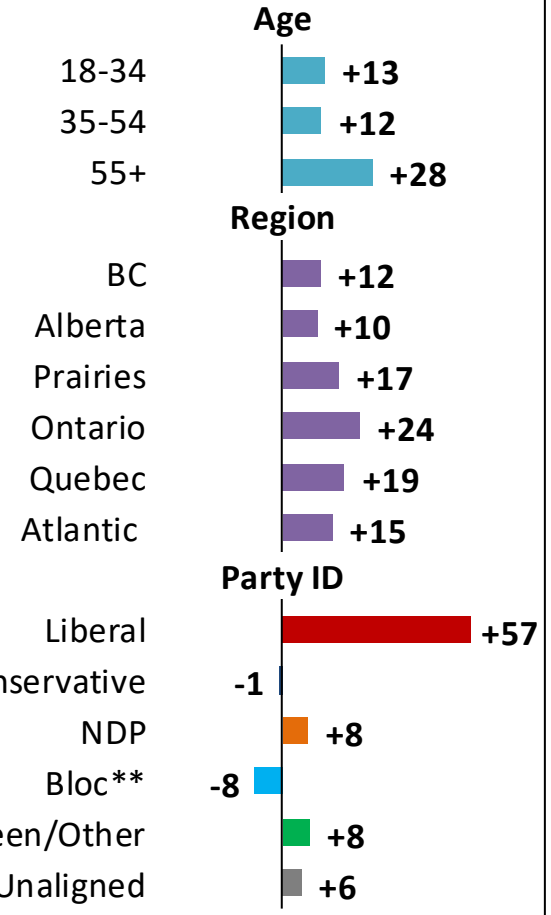
# Direction of Approval Process: Almost 2-in-5 believe gov't is headed in the right direction; 27+ point gap between Liberals and others



Thinking about the Federal government's efforts to change how project approval works in Canada, would you say the Federal government is moving in the right direction or the wrong track?  
[asked of all respondents nationally, n=1,000]



## Segmentation NET 'Right direction' (pre-information)



\*Asked at the beginning and again at the end of the Fast tracing/MOU questions

\*\*Sample size <50, results should be interpreted with caution

Current data: May 2026 (W3)

# Understanding NIMBY

As part of our Understanding NIMBY, we ask Canadians (and sometime Americans) to answer the following question on a random selection of infrastructure projects:

**Q** Generally speaking, would your initial reaction be to support or oppose a proposal to build each of the following projects ... ?

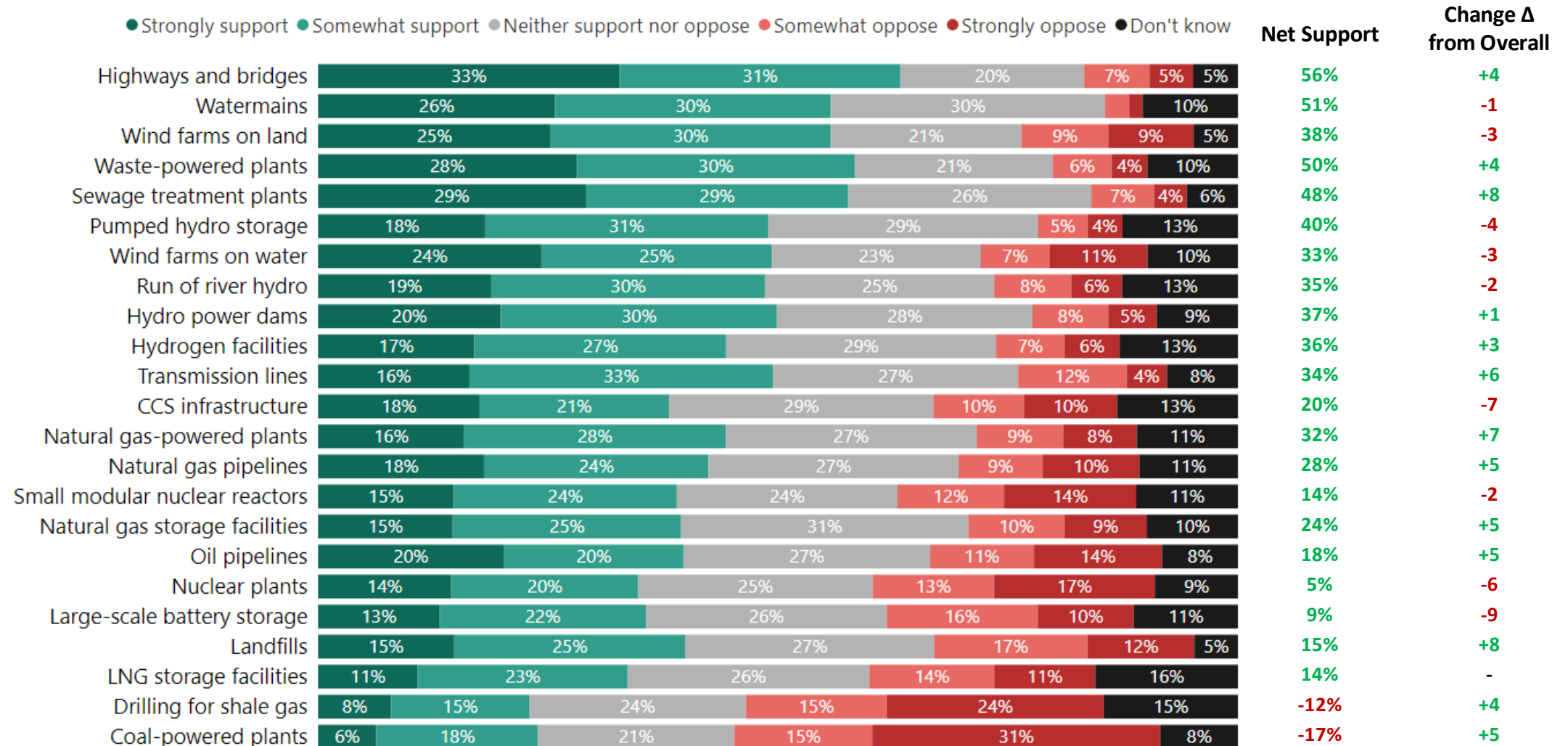
CCS infrastructure	LNG Storage facilities	Sewage treatment plants
Coal-powered plants	Natural gas pipelines	Small modular reactors
Drilling for shale gas	Natural gas storage facilities	Transmission lines
Highways and bridges	Natural gas-powered plants	Waste-powered plants
Hydro power dams	Nuclear plants	Watermains
Hydrogen facility	Oil pipelines	Wind farms on land
Landfills	Pumped hydro storage	Wind farms on water
Large-scale battery storage	Run-of-river hydro	

# Community Support (Rural): Highways and bridges lead at 56% net support; battery storage sees the largest rural gap (-9 pts)



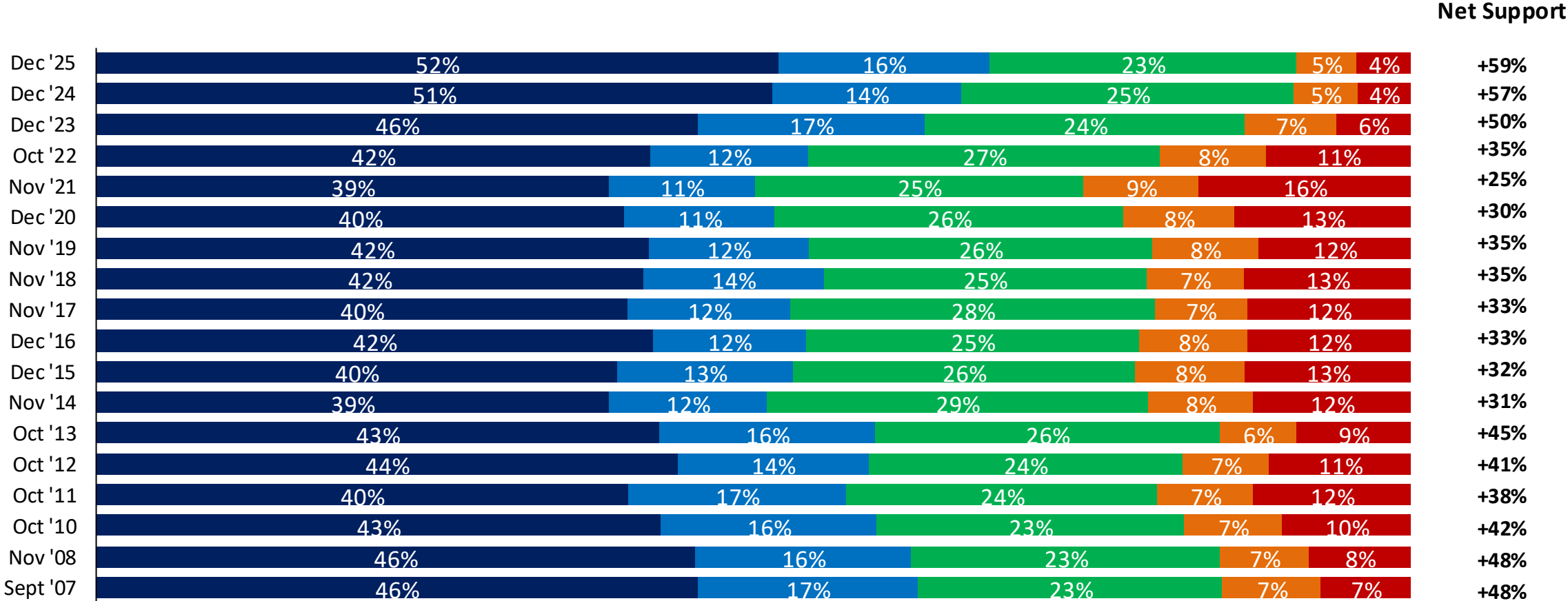
Would you support or oppose a proposal to build each of the following near your community?

[Respondents were asked a random 12 projects]



# General Support: Just over 2-in-3 (68%) are supporters while only 9% are opponents; net support shows a strong overall increase since 2021

General Support for Projects Index



■ Strong Supporter    
 ■ Soft Supporter    
 ■ Neutral/Mixed    
 ■ Soft Opponent    
 ■ Strong Opponent

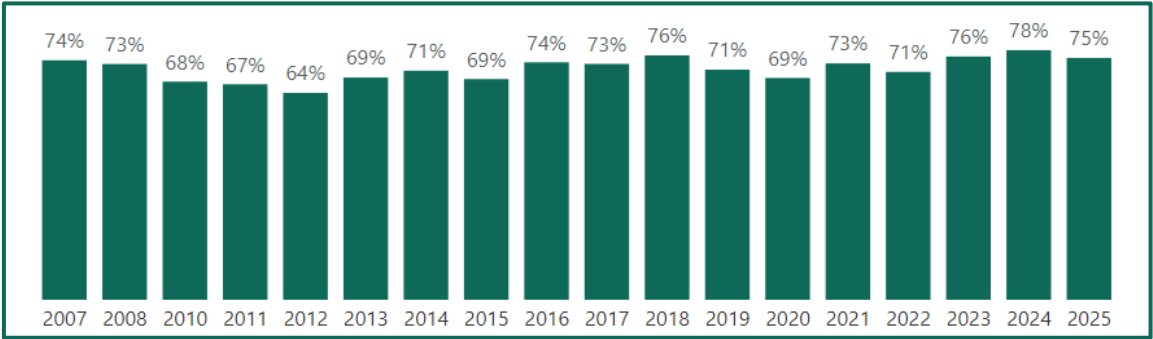


# Social Permission: 3-in-4 Canadians would give social permission to the proposed project, a three-point decline from 2024



Which of the following best represents your view of that project?\*

[asked of all respondents]



**Note:** This question follows a series of questions asking respondents about their awareness of specific proposal projects near or in their community over the past few years. The closest project to the respondent's community is the "project" referenced in this question.

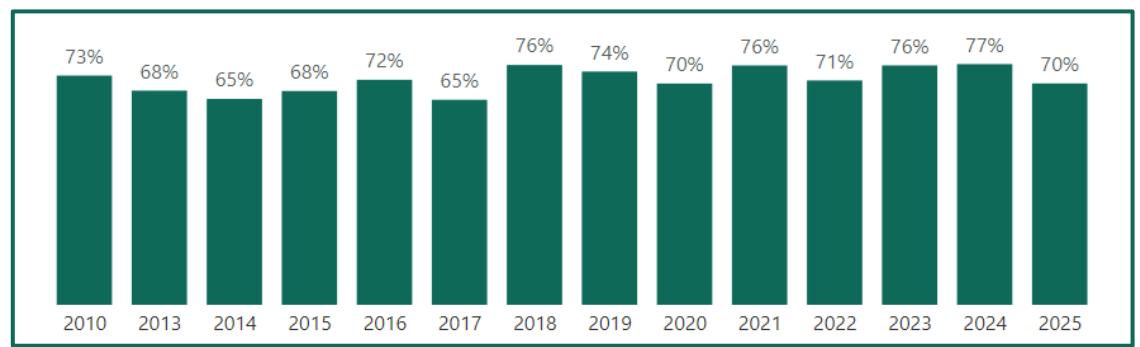
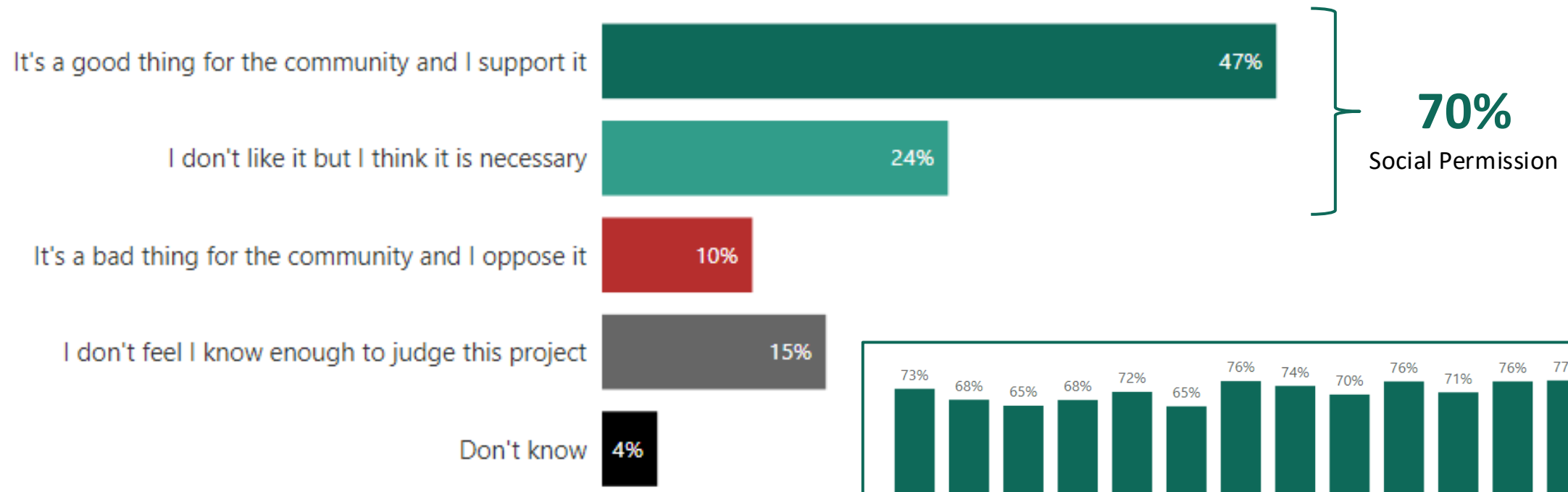


# Social Permission (Rural): 70% grant social permission, the lowest since 2020; nearly half support the project and see it as a good thing



Which of the following best represents your view of that project?\*

[asked of all respondents]

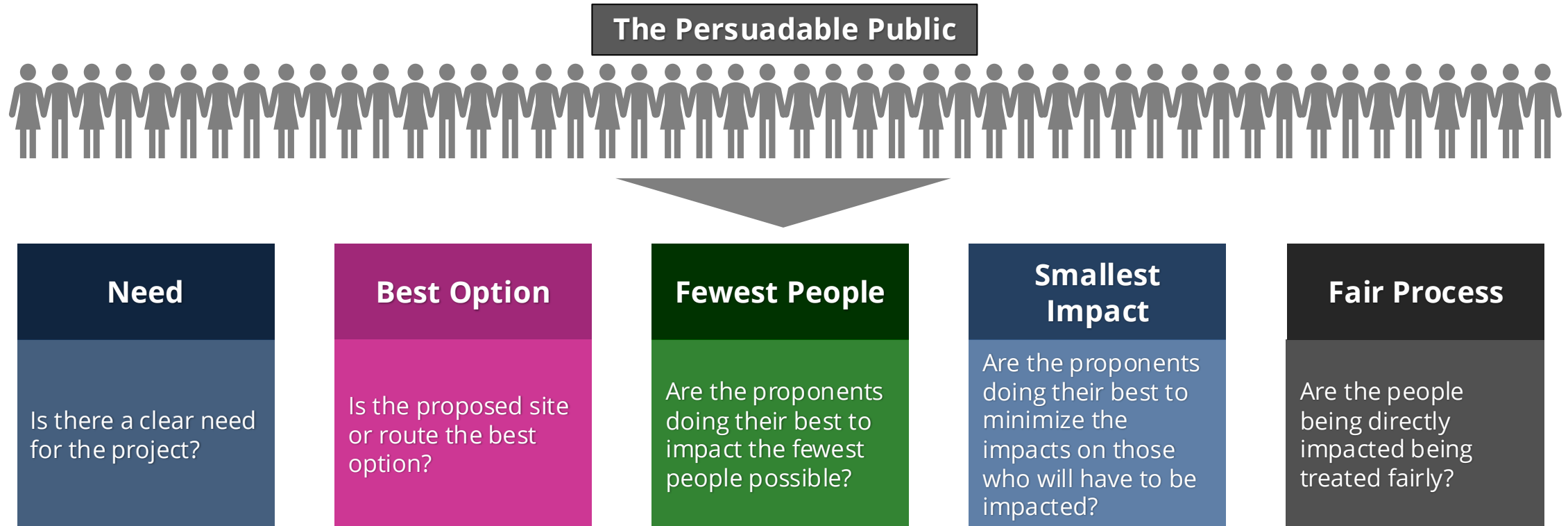


**Note:** This question follows a series of questions asking respondents about their awareness of specific proposal projects near or in their community over the past few years. The closest project to the respondent's community is the "project" referenced in this question.



# Hurdles to Social Permission

Project proponents must overcome hurdles to social permission by answering the **5 veto questions**:



If proponents can answer **“yes”** to each of these questions, it can build permission. If proponents answers **“no”** to any of these, then the project is at risk of being derailed.

# Deeper Dive on Data Centres

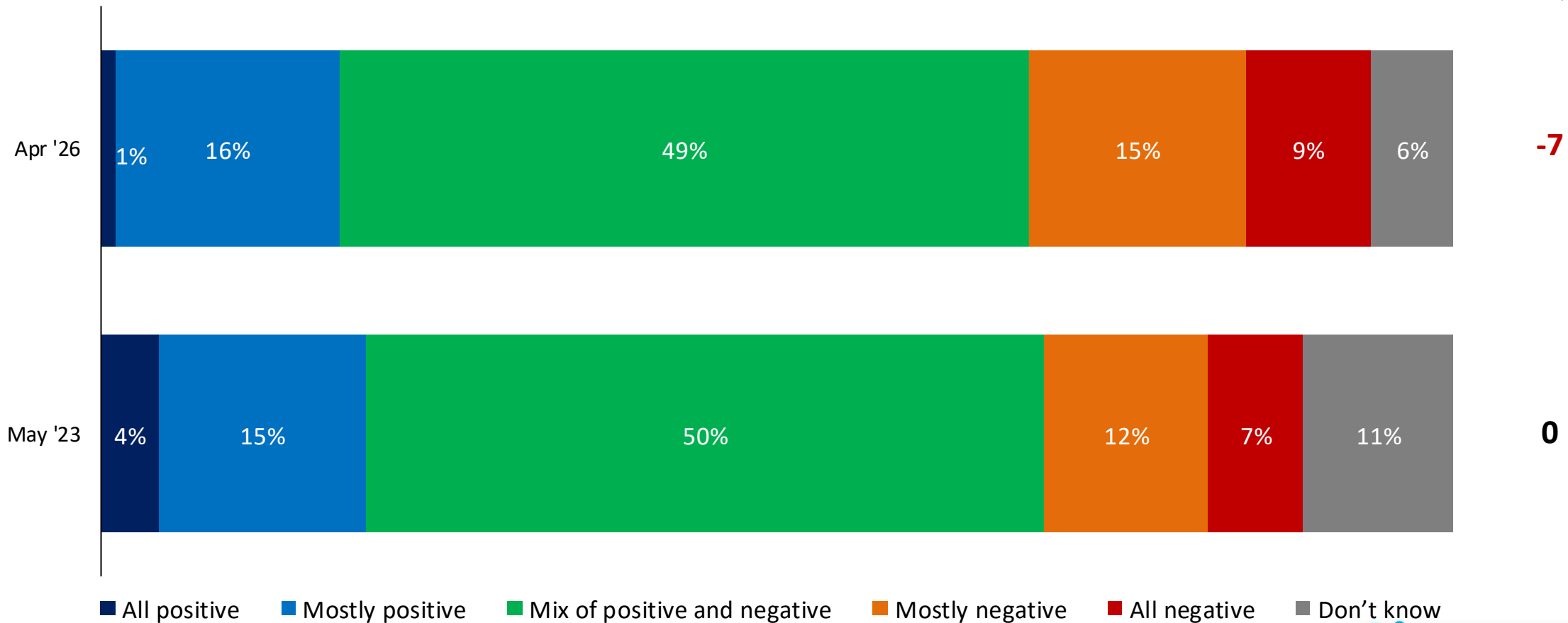
# AI Societal Impact: Net positive has decreased 7 points since May '23; half of respondents report mixed impacts



Overall, would you say artificial intelligence technology has had a positive or negative effect on our society so far?

[asked of all respondents n=1,500]

Net Positive



■ All positive ■ Mostly positive ■ Mix of positive and negative ■ Mostly negative ■ All negative ■ Don't know



Note: Current data: April W3-4 2026

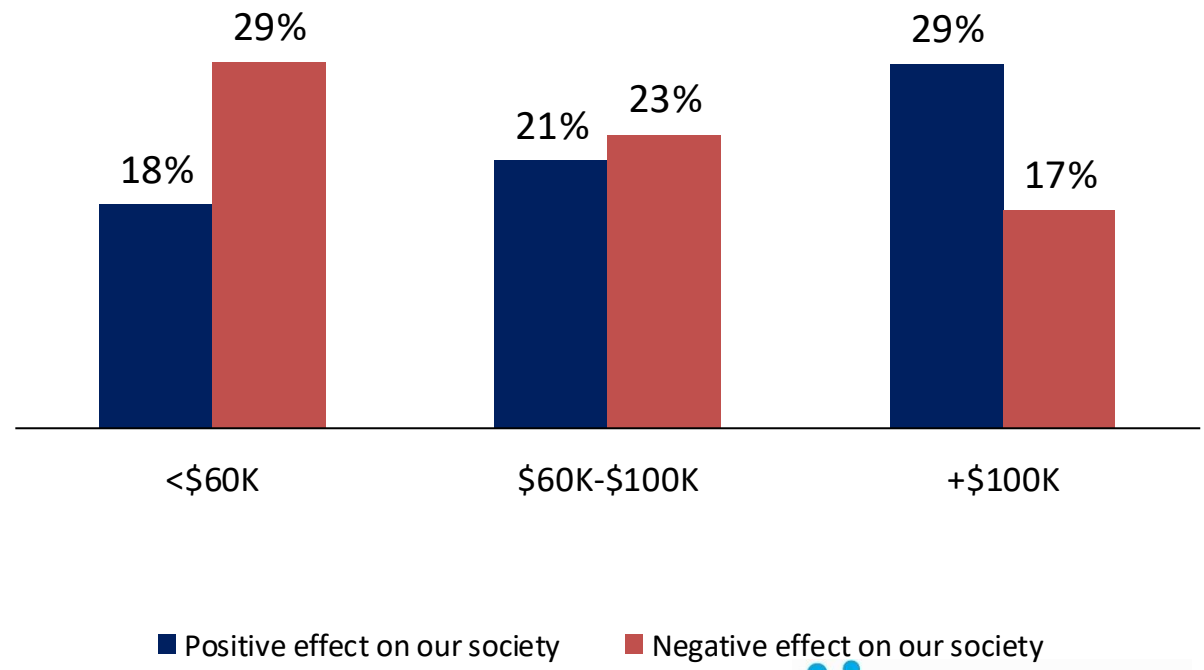
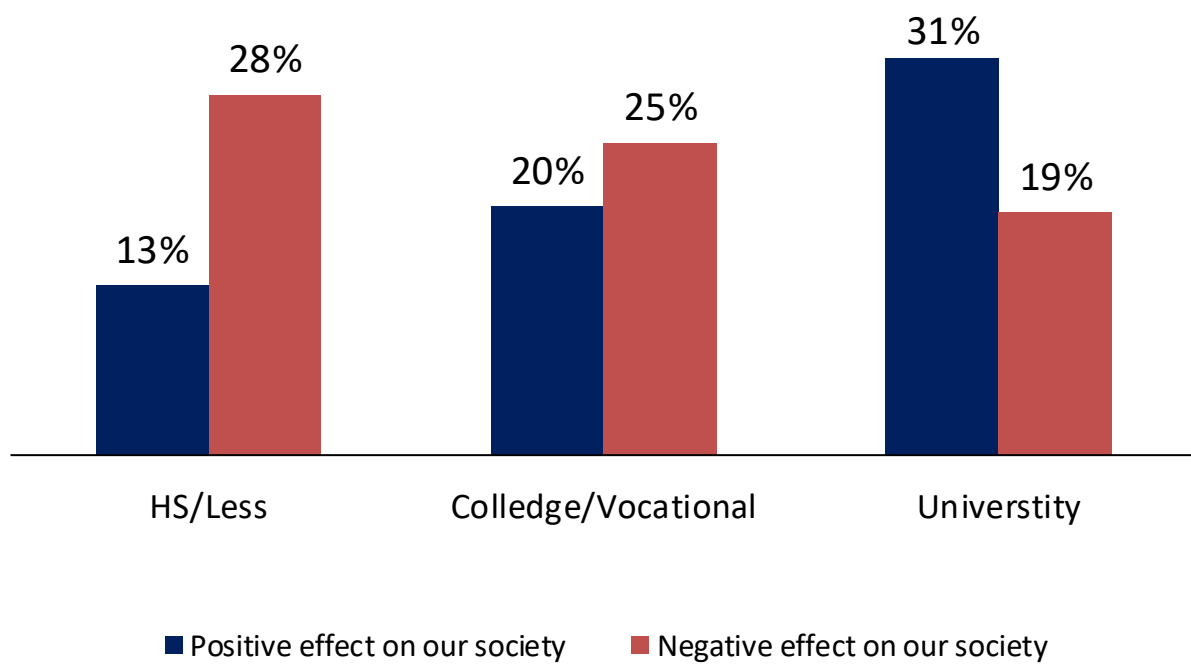
# AI Societal Impact: As education and income level increase, perceptions of AI become more positive and less negative



Overall, would you say artificial intelligence technology has had a positive or negative effect on our society so far?  
[asked of all respondents n=1,500]

Those with University degree are only cohort that feels Net positive about AI's societal impact

Those earning +100K are only cohort that feels Net positive about AI's societal impact



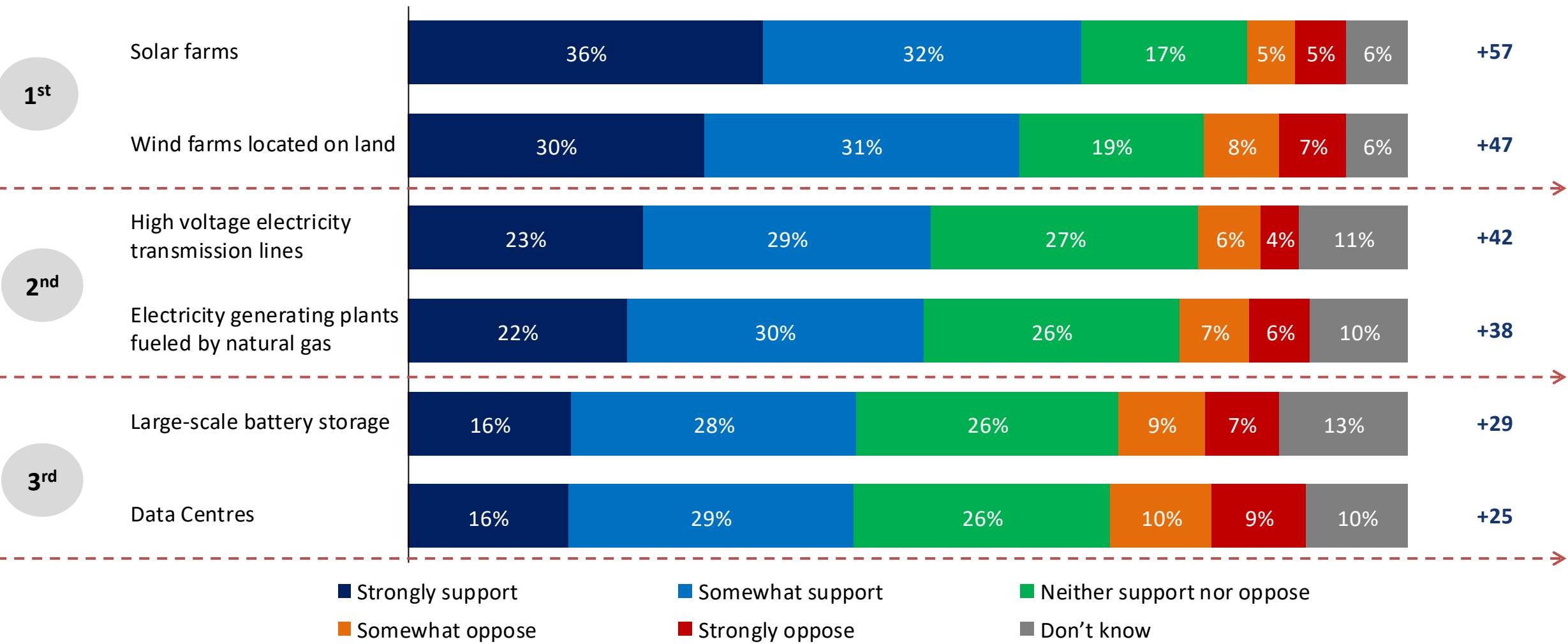
Note: 'Don't know' if important project not shown.

# Support For Different Infrastructure: Solar farms with most support +57; second tier electricity with; third tier with least support +25, data centres



Generally speaking, would your initial reaction be to support or oppose a proposal to build each of the following projects in your province?  
[asked of all respondents, n=1,500]

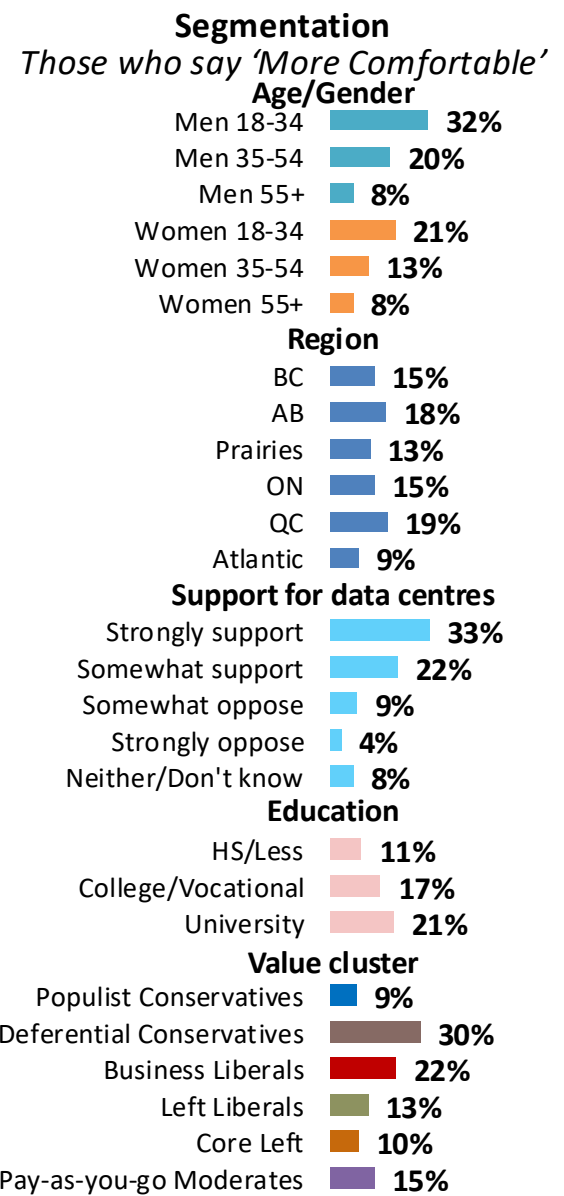
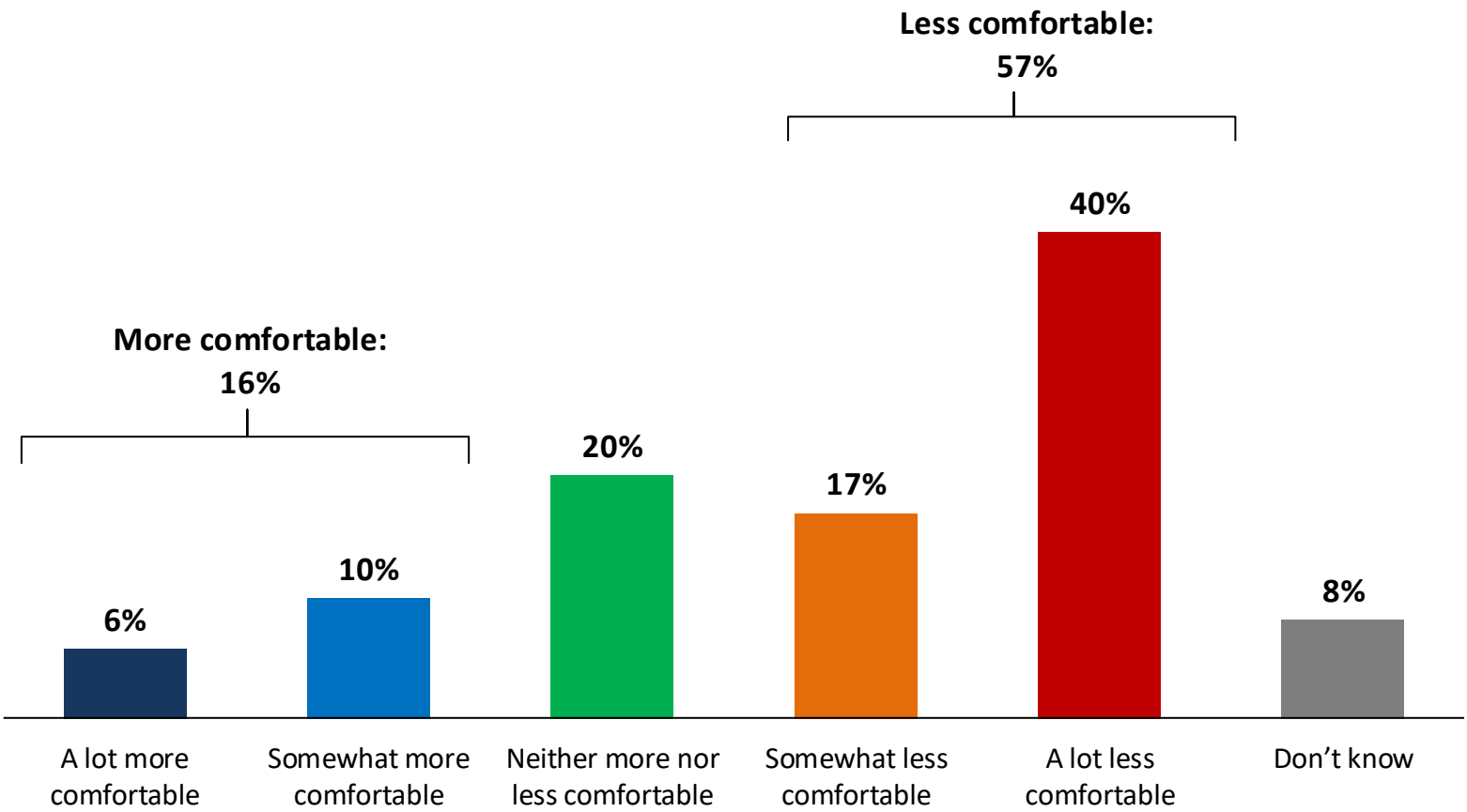
Net Support



Note: Current data: April W3-4 2026

# Rising Electricity Prices: Increasing electricity prices would make Almost 3-in-5 feel less comfortable about data centres; 20% are neutral

**Q** If a data centre was being proposed near you, please indicate whether the following elements would leave you more or less comfortable with that data centre.  
**Connecting new data centre to the electricity grid can require investments that raise electricity prices for everyone.**  
 [asked of all respondents n=1,500]



Note: Current data: April W3-4 2026

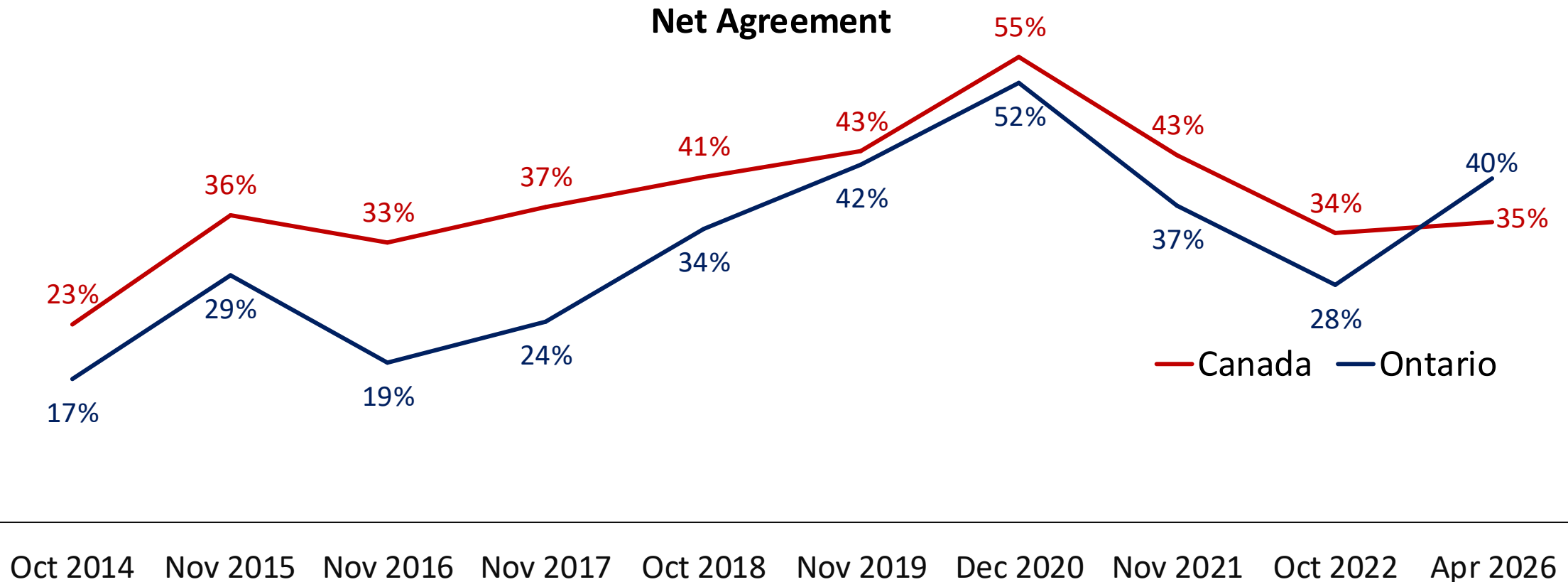
# Trust?

# Reliability and Quality Protection: Net agreement in Ontario is up 13 pts since 2022, while National remains unchanged



And, in general do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements? **Consumers are well protected with respect to the reliability and quality of electricity service in my province.**

[asked of all respondents nationally, n=1,500]



**Note:** Prior to 2017, “Neither agree nor disagree” was not provided as an answer.

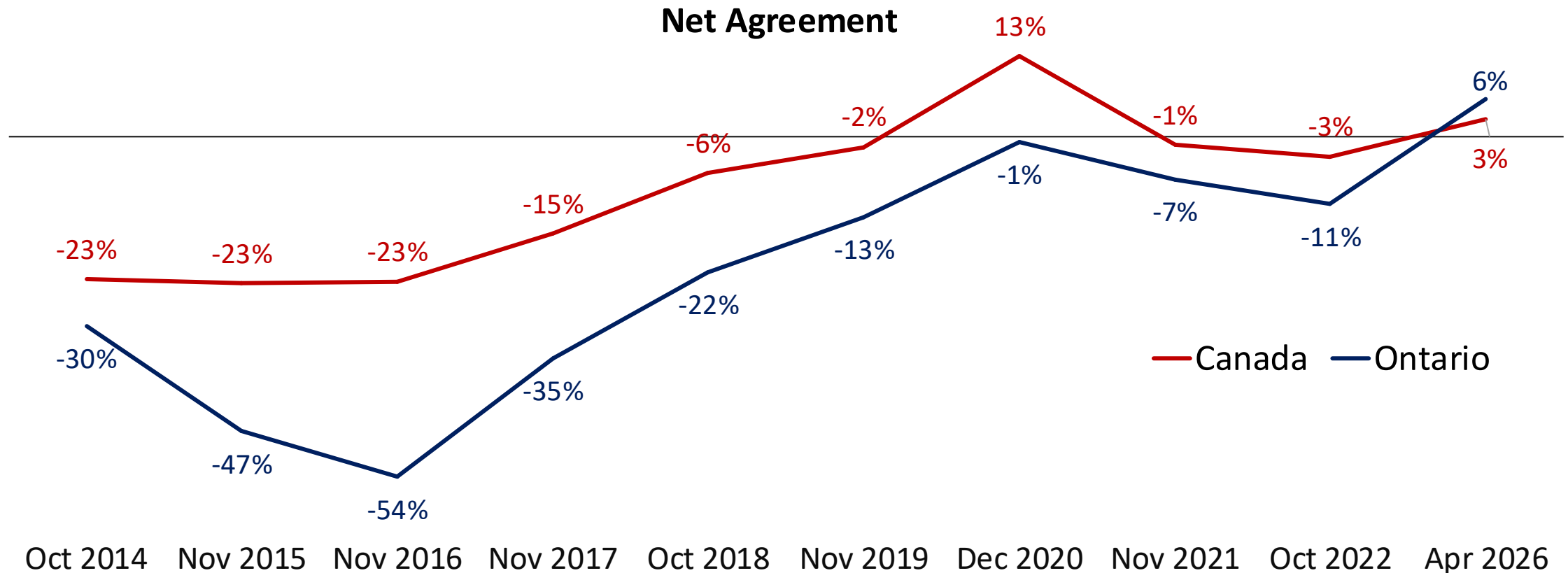
**Note:** Current data: April W1-2 2026

# Price Protection: Ontario net agreement surpasses the national level, and is now at its peak since tracking began



And, in general do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements? **Consumers are well protected with respect to the price of electricity service in my province.**

[asked of all respondents nationally, n=1,500]



**Note:** Prior to 2017, “Neither agree nor disagree” was not provided as an answer.

**Note:** Current data: April W1-2 2026

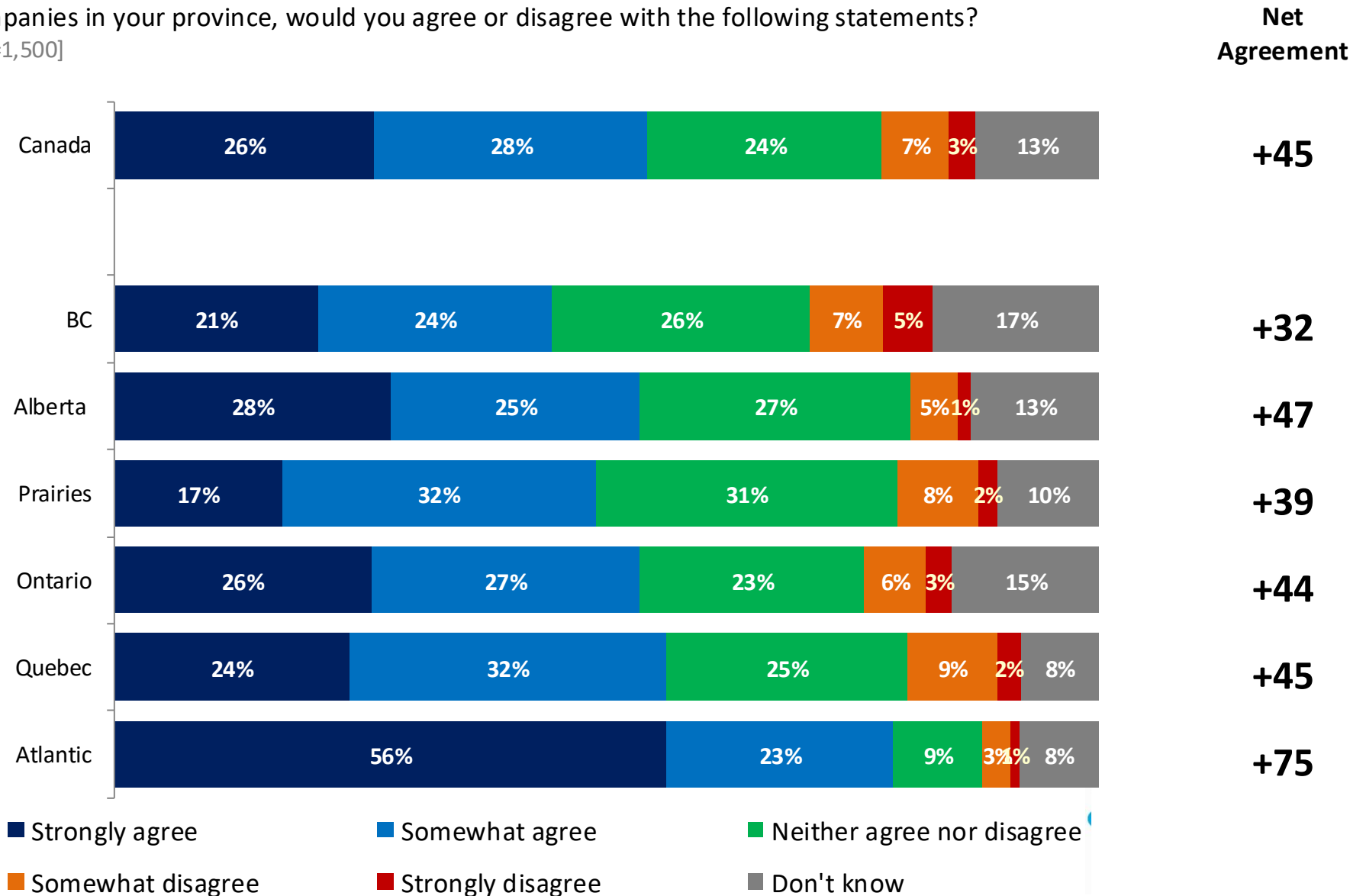
# Alienation isn't just a Political Challenge. It is an Energy Challenge



Thinking about the electricity companies in your province, would you agree or disagree with the following statements?

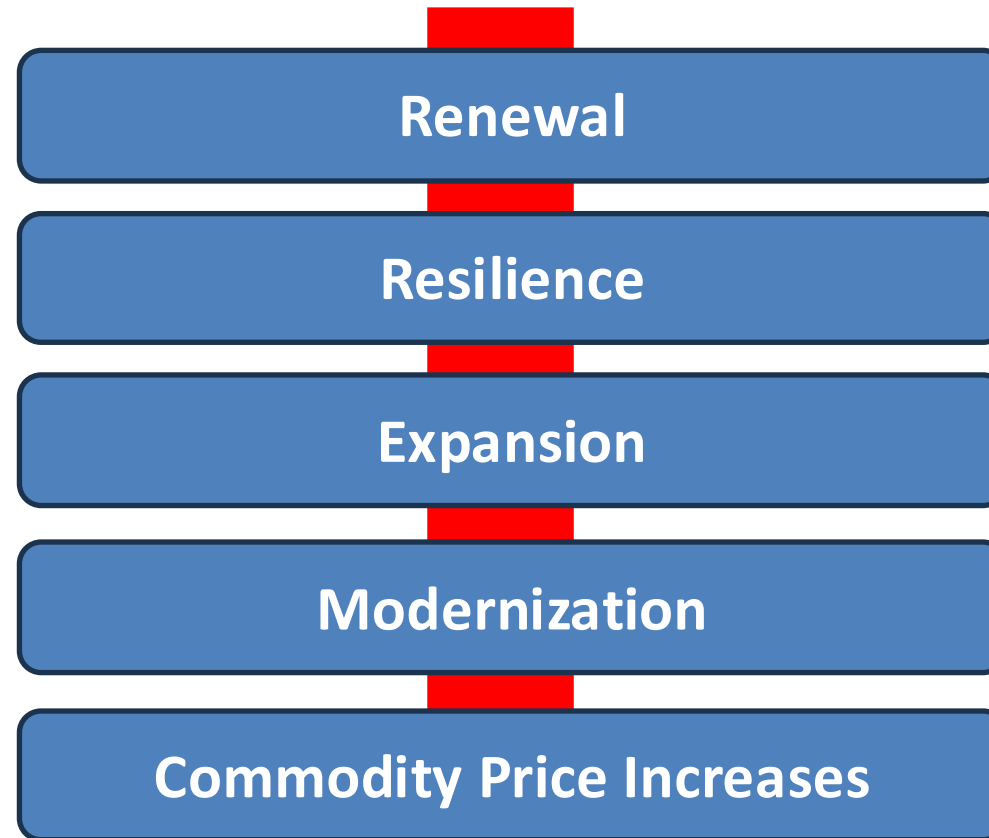
[asked of all respondents nationally , n=1,500]

Electricity companies in this province **waste too much money** on outrageous perks, salaries and bonuses for executives.



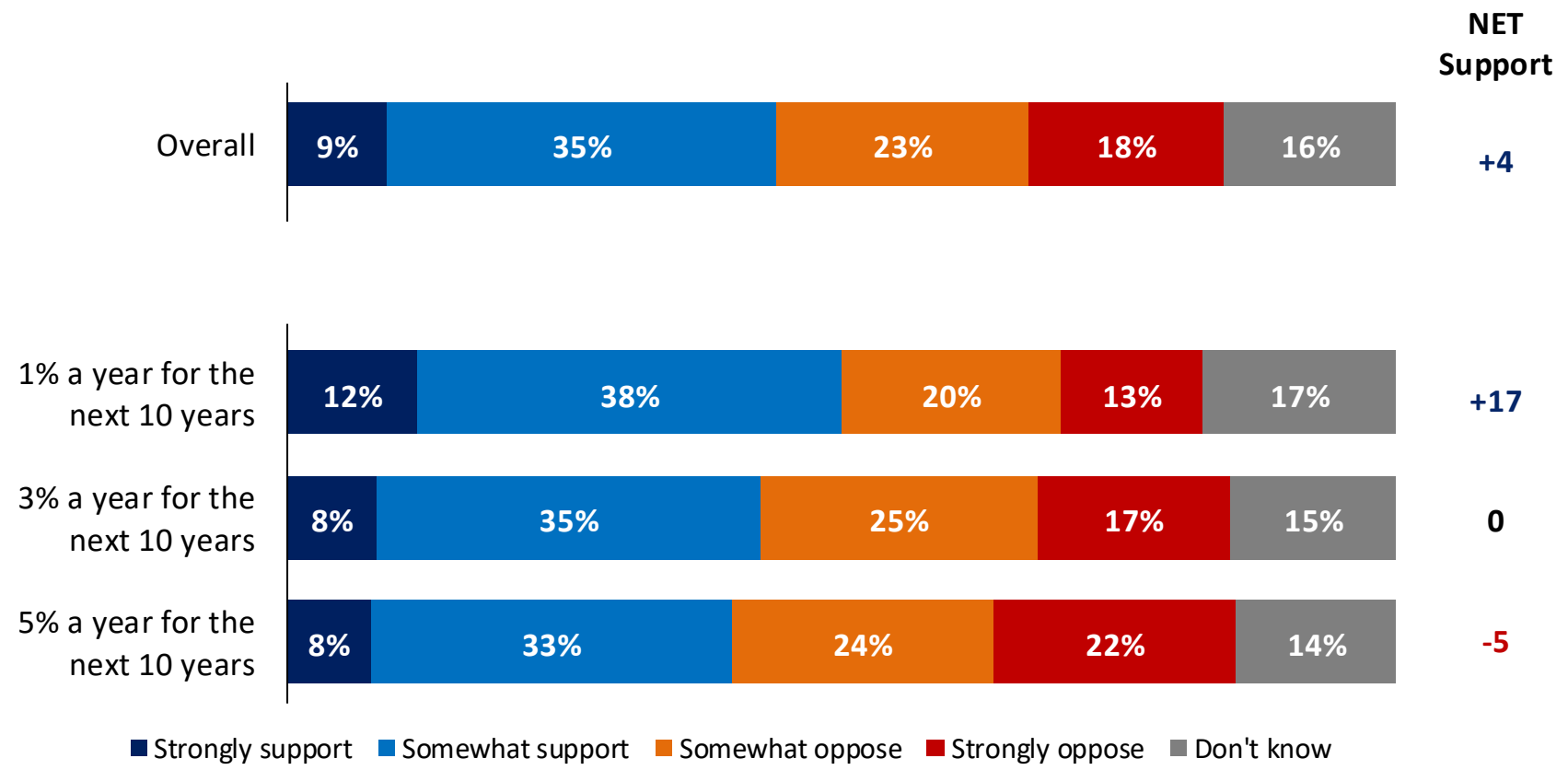
# Perceptions of Affordability and Willingness to Pay

# We can see a series of price shocks coming



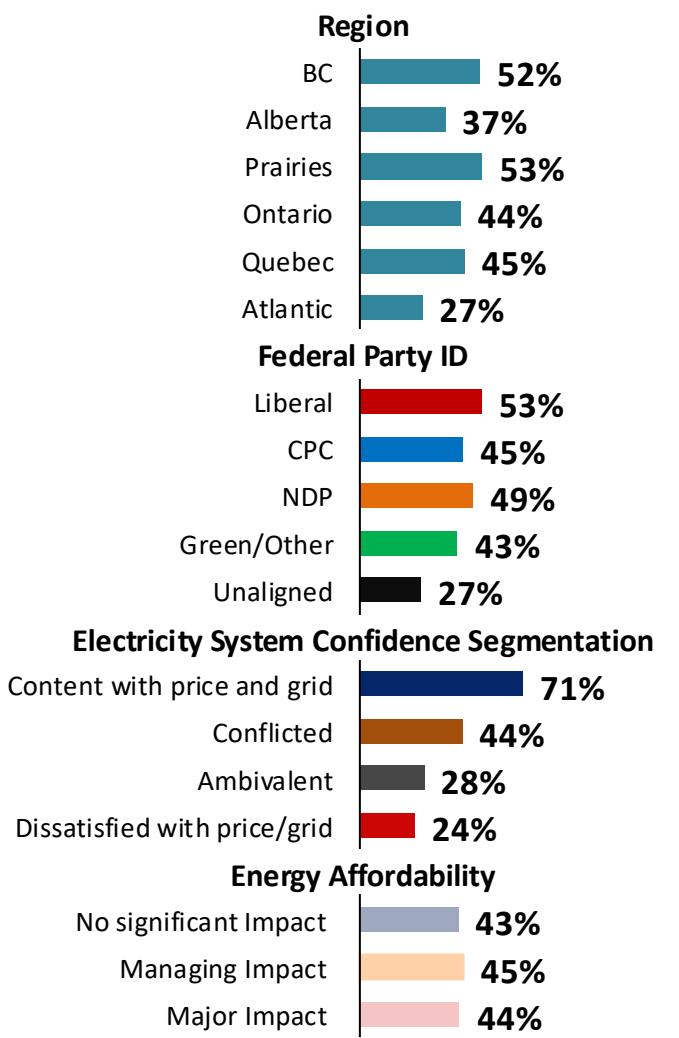
# Willing to pay varies greatly across the country

**Q** Electricity prices will need to increase to fund expansion of the electricity grid.  
 Do you support or oppose investments to expand the electricity grid if, in addition to routine increases, your electricity bill were to rise by:  
 [asked of all respondents nationally; n=1,500]



## Segmentation

Those who say "Support"



Note: Current data: April W1-2 2026

# Summary

# We are in a good news, bad news moment

- 1. Generational economics continue to drive angry younger voters towards a materialistic agenda.**
- 2. Trump has had two particularly significant impacts:**
  - He has re-enforced the shift to materialism.
  - He has left older Canadians as angry as young Canadian.
- 3. The combination of Trump and generational economic leave Canadians more supportive than ever towards infrastructure, but reluctant to pay more for new build.**
- 4. Cultural Alienation makes this situation more complicated.** The energy sector must tread carefully to avoid becoming the target for anger at elites.

# Tips to Avoid Outrage

## 1. **Policy:** Use policy to protect customers:

- a) Deliver rate relief to vulnerable consumers and price-taking industries.
- b) Push the capital burden out over time

## 2. **Process:** Recognize the power of regulatory process to build credibility:

- a) For infrastructure, establish need and establish a ***best alternative*** dynamic rather than a ***referendum*** dynamic.
- b) For price, show accountability and demonstrate value for money.

## 3. **Operations:** Manage activities to avoid triggering outrage:

- a) Customer contacts: First call resolution. Establish and manage expectations.
- b) Siting: Don't make neighbours pay a private price for a public good.
- c) Demand Management: Leave customers with ultimate control.
- d) **Search for savings!**



# Building Understanding.

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